Top career development resources: The best of Calvin Sun

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Communications coach and author Calvin Sun has been sharing his insights on TechRepublic with the aim of helping IT pros develop their careers by improving their professional interactions. This collection includes a number of his most popular articles, spanning the basics of business communications, from telephone and e-mail etiquette to negotiation skills to effective methods of dealing with pretexters.

Table of contents

10 tips for increasing your professional visibility and exposure

Being recognized in your field can make you more valuable in your current job and more marketable if you decide to change jobs. The tips below can help you gain that visibility and exposure. The first four are aimed primarily at the employee of a company, while the rest apply either to the employee or to the independent consultant.

#1: Develop your elevator talk

The elevator talk is the 15- to 30-second talk you would give to a senior executive while both of you are in an elevator. It's your chance to impress that person, so make the most of it. Important parts of the elevator talk include:

- Who you are
- What project you're working on
- A significant accomplishment you've made

#2: Talk to bosses during office social events

During an office social event (for example, the holiday or Christmas party), it's generally easier to approach your boss and his or her boss to say hello. At those times, it's important to have your elevator talk prepared. Business talk is good, as long as you stay away from salary, benefits, and other personnel questions. Try to make your approach, if you can, out of the sight and earshot of your peers, so they don't think that you're being fawning toward your bosses.

#3: Introduce yourself when in another location of your company

Your job may take you to another part of the country, where you might be working with another part of your company—for example, with a different branch office. In that case, make an effort to introduce yourself to the head of that office. You really don't need a formal appointment. Simply introduce yourself to that person's assistant and find out whether you can just "stick your head in the door" to say hello. Tell that person who you are and what you're doing for that person's office or staff.

#4: Volunteer for company events

United Way drive… company picnic…holiday party. All of these events need company employees to run them. They take time, but helping with them can bring you recognition, especially if you're working side by side with upper-level people who one day could be your boss.

#5: Speak to outside groups

Speaking to groups can give you credibility and increase your professional contacts. It also builds your own knowledge of your topic, because in researching and creating your talk, you inevitably will learn more about it.

Look for a topic you're familiar with and which would interest an audience. Focus on how your information can benefit audience members. Avoid simply repeating facts. Share any analysis you have done, offering insights for the audience. When looking for groups can speak to, consider industry and professional associations, local chambers of commerce, and service organizations, such as Rotary. Your initial talks probably will need to be given free of charge. However, as your reputation expands, you might be able to charge a fee for them.

One variant of speaking is to teach, perhaps at a local community college. Be aware, however, that such an obligation can involve significant preparation time and little pay.

#6: Write for professional publications

Nothing beats seeing one's name in print, with a byline following the title. The same approach applies to writing as with speaking to groups: Pick a topic you know well and which would appeal to the readers of a publication. That means, of course, that you have to know the types of readers a publication has. Most publications will ask for a query letter or e-mail first. In it, you outline your proposed article and possibly submit samples of your previous work. On the other hand, I have gotten articles published simply by sending them in.

The publication *Writer's Market* has been tremendously helpful to me in this regard.

#7: Serve as a source for news media

Reporters like to quote authorities when writing a story. If they quote you in print or on the air, your reputation is enhanced. Once you identify a reporter, introduce yourself by phone or e-mail. If you call, and the person answers, ask first whether the person is on deadline. If he or she is, offer to call back. Such a question indicates that you're sensitive to the reporter's time. If you're sending e-mail, include a biographical statement or resume if possible and stress why your knowledge is important to the reporter's readers, viewers, or listeners. If you work for a company, be careful about mentioning the company by name. Your employer might be upset if you appear to be speaking for the company rather than yourself.

#8: Mentor or advise a student group or club

I've never done it, but advising a student group, such as a student chapter of the Association of Information Technology Professionals (AITP), is another way of gaining exposure and contacts.

#9: Moderate a panel discussion

Even if you aren't able to give a presentation at a conference, you still might be able to participate by moderating a panel discussion. The responsibilities will vary depending on the conference and the conference organizer. However, most moderators are responsible for making sure the discussion starts and ends on time and that all participants have a chance to speak. You might want to have some questions prepared beforehand that you can ask the panel to answer.

When taking questions from the audience, always repeat the question so that the entire room (panelists and audience) can hear it.

#10: Serve as board member or officer of a professional association

It's pretty easy to serve in either of these capacities because generally, no one wants to do it. If you're the treasurer, you'll be responsible for keeping track of money for the association, such as registration fees received for any conferences, and expenses incurred for speakers, facilities, and other reasons. The other officer and board positions generally are concerned with maintaining and increasing membership, for planning and finding speakers for meetings, and various administrative tasks. If you're willing to put in the time, having such an accomplishment would look good on a resume.

Successful negotiating requires perspective and flexible thinking

"We need this done right now"... "Can you deliver this afternoon?"... "I need you to work this Saturday!"

We all want something from someone else. At the same time, other people, usually customers or bosses, want things from us. The better we are at negotiating, the more successful we're likely to be — and the more likely it is that we'll keep our sanity. Here are some tips to get you there.

#1: Know as much as you can about the other person

In his classic work *The Art of War*, the ancient author and strategist Sun Tzu discussed the importance of knowing the enemy as well as ourselves. He said:

- If you know the enemy and know yourself, you need not fear the result of a hundred battles.
- If you know yourself but not the enemy, for every victory gained you suffer defeat.
- If you know neither the enemy nor yourself, you will succumb in every battle.

When I conduct training for IT professionals in customer service, I often have attendees do an exercise in persuasion. I ask them first to think of a policy they think customers will resist (for example, asking that customers call a central help desk, rather than call individual IT staff people). Next, I ask them to think like the customer and list as many reasons as they can why following the policy would benefit them, the customer (as opposed to benefiting the IT person or department, although some reasons would involve benefits to both). Finally, I ask them to think of objections the customer might raise and how the IT person would address that objection. At the same time, I caution them that if they are unable to come with good responses to objections, they might need to reconsider the policy.

#2: Distinguish between objectives and methods

Don't confuse objectives with methods of achieving those objectives or you'll restrict your thinking. The following story, from the book of Daniel, illustrates this point:

> A young man long ago was being groomed, along with others, to take up official positions to serve a king. In doing so, these young men had to follow a royal diet. However, the young man's religious beliefs prohibited him from doing so. This refusal upset a supervising official, believing the resulting worse appearance of the young man would cost the official his life.
>
> The young man made a deal with the official. He asked the official for a ten day test, during which he would eat only vegetables and drink only water. At the end of that time, the official saw how much better than the others the young man looked, and let him keep that diet.

The apparent objectives of the official (young man eats the royal food) and the young man (don't eat the royal food) conflict and are mutually exclusive. However, this view about objectives is wrong. The official's objective was not that the young man eat the royal food. His objective really was that the young man have a good appearance. Because that objective doesn't conflict with the young man's objective, it was possible to achieve both of them.

Let's say an executive needs a document right now, but he's having trouble with remote printing. Rather than spend large amounts of time trying to resolve the printing technology, what if you simply faxed a copy of the document?

#3: Understand various options for resolving the situation

Once we understand objectives, we need to break down the situation to discover underlying issues. Then, we can look at various options, which include:

- **Varying time and sequence.** If you're asking someone to do a series of actions, do they all have to happen right now? What if some of them happened later? Do you care if they change the sequence of what they do, as long as you still get what you want?
- **Varying place.** Do you care where a particular action occurs or where a delivery is made? Can that action or delivery occur somewhere else?
- **Varying the person.** Do you really care who performs a requested task, as long as it happens?
- **Chunking.** Instead of dealing with a large issue, can it be worked on as smaller pieces? For example, the young man limited the dietary test to 10 days, rather than running it continuously until the time came to see the king. By setting a limit, both sides had time to take corrective action.

Here are some examples that illustrate how varying these options can help both parties reach an agreeable solution.

Example 1: You want a supplier to deliver 100 cartons of toner to one of your locations by next Friday. The supplier says it's a problem. Here are some questions to consider:

- How critical REALLY is the Friday date? What can the supplier deliver by that time — and is that amount something you can live with for the short term? Alternatively, when *can* the supplier deliver the full 100 cartons?
- What flexibility do you have with your office needs? Can you do other things in the meantime that don't involve this toner?
- Do you really need all the toner at that particular location? Are there alternate locations within your company where the supplier could deliver?
- Do you have to use this supplier? Can you ask another supplier or ask this one to subcontract to someone else?
- Do you have other obligations the supplier is fulfilling for you and are these other obligations hindering the Friday date? If so, how willing are you to let the Friday shipment take priority?

Example 2: I was once part of an application development team, and our project was the development of a new interactive voice response system involved with employee retirement plan information and transactions. In all, we had 10 programs to develop. Half of the programs allowed a caller to update and change information and perform transactions, and the other half were simply inquire-only programs (for example, one program provided account balance information).

When it became clear that we would miss the delivery date, our project manager worked out an alternate arrangement with the project users. We would focus on finishing the inquiry-only programs by the original delivery date, then complete the other programs by a later date. The alternate plan worked, and the sponsor and users were happy with the system.

Why your IT department should present a united front

More than 1,500 people died when the *Titanic* sank on April 15, 1912. An iceberg had struck the starboard (right) side. Less than three hours later, the great ship was gone. Do you think any survivors from the port (left) side were thinking, "Good thing the iceberg hit the OTHER side"?

This point has relevance for your job. Suppose someone in the IT group is trying to resolve a problem with a customer. In doing so, he or she learns that a co-worker, Joe, from a different department within the IT group, gave wrong information to the customer, and that the information created or worsened the problem. Do you think that person would ever say:

- Joe told you WHAT??!
- Don't listen to Joe's department. They're all messed up.
- (Shaking head): $&@ unbelievable.

These sentiments are understandable, and expressing them is easy. However, think about it from the customer's perspective. That customer wants the problem resolved quickly. Hearing that type of comment might cause the customer to think, "Why is this person wasting my time complaining about a co-worker?" More seriously, the customer might also think, "Those people in IT: Do they know what they're doing?"

The less familiar we are with an organization, region, or country, the less we can distinguish small details within it. You know, within your IT group, who the directors and managers are and what they do. You may have a help desk, an infrastructure team, an applications development team, and a data center team. You know the differences between these departments and you know who is where.

Chances are, though, your customer is less aware of these differences. To that customer, the boxes and lines under the CIO don't exist. All the customer sees is the big box and visualizes a label of *information technology*. Therefore, when one IT person criticizes another, the customer doesn't make a distinction but simply thinks, "IT has a problem." Witnessing this type of behavior can embarrass customers and can cause them to question the competence of the IT group.

You may think your criticism distances you from the other, problematic IT person. However, like the starboard damage to Titanic, this behavior affects and hurts the whole organization. In fact, one of my clients, the CIO of a major energy company, told me once that this type of behavior, in his mind, was grounds for termination.

I once called the office of the CIO of a major retailer and reached his assistant, whom we'll call Tina. After I explained why I was calling, Tina referred me to the CIO's director of client services. I then called that director and introduced myself and my work. However, when I told him how I was referred to him, the director became furious, saying, "If Tina did that, she's in a lot of trouble." Of course, I made little progress with that director, never hearing from him again.

His outburst was a perfect example of the port side Titanic passenger mentality. By making that statement to me, an outsider, he exposed divisions within the CIO organization. If I had been that director, here's what I would have done: I would have listened to the caller but would have said nothing about Tina's actions, even if I had a problem with them. Then, after hanging up, I would have gone to Tina and found out more.

If her actions were wrong, I would have spoken to her about it privately, working out an arrangement on handling future calls of that type. More important, if she had a good reason for giving the information (perhaps, for example, the CIO had told her to do so), finding out the details would prevent me from looking foolish and unprofessional.

Postscript

I called back a few times afterward, trying to reach that director. The first time, I heard a voicemail saying that he was on an extended vacation. The next time, the voicemail said his new job responsibilities called for frequent travel. The last time, his voicemail said he was no longer with the company.

So how do we handle this situation? First, accept the fact that differences will occur. IT professionals may disagree on strategy, or choice of vendor, or schedule for rollout. Before a decision is made, you're free to voice your opinion. However, once the decision is made, it's best to support it. In other words, keep the dirty laundry hidden. Criticizing a decision or a co-worker publicly may mean serious consequences for you.

Second, realize that a co-worker who gives different information to a customer may not necessarily be wrong. That information may have been based on different assumptions or circumstances (for example, a different software release or system configuration). In such a case, when the customer tells you that Joe said something different, consider telling the customer that you will talk with Joe to understand what Joe said. Afterward, go back to the customer with advice that both you and Joe have agreed on.

Presenting a united front to the customer protects the reputation and image of the IT organization, and it can protect and enhance your career.

Interrupting others can sink your communications

9:30 P.M., Sunday April 14, 1912: As the *RMS Titanic* approaches the coast of Newfoundland, Canada, wireless operator Jack Phillips begins transmitting passenger messages to a lighthouse at Cape Race. The wireless system, fairly new at the time, had become a sensation to passengers. As a way of impressing friends, relatives, and business associates, passengers would send them messages from *Titanic*.

Phillips had had a difficult day. Twenty-four hours earlier, the wireless had broken down, and Phillips had worked until 5 A.M. Sunday morning to fix it. Those long hours, plus the large number of messages to transmit, have caused him to feel tremendous pressure.

At 11:00 P.M., while continuing to send passenger messages to Cape Race, Phillips receives a message from the Leyland liner *Californian*. Because of *Californian*'s close distance to *Titanic*, the message blasts through Phillips's headset (imagine accidentally turning on your iPod while it's set to full volume). "Say old man, we are stopped and surrounded by ice," *Californian* says. Instead of acknowledging or acting on the message, Phillips, in a pique, replies, "Shut up! Shut up! I am busy. I am working Cape Race!" No further message comes from *Californian*.

Forty minutes later, *Titanic* strikes the iceberg, and 1,500 people lose their lives.

Why do we do it?

When we interrupt people, we run risks by missing the information they were trying to give us. *Titanic* wireless operator Jack Phillips interrupted an important transmission because he thought he had more pressing matters to deal with. And although no one will say that this one incident was the sole reason for the *Titanic* disaster, it very well could have been a factor.

Why do we interrupt others? Most often we do so because we think we know what the other person is going to say. Rather than (in our mind) waste time, we simply answer according to what we think the other person is about to say.

Have you ever been interrupted this way? Think back on what happened. For example, maybe you:

- Called a company switchboard because you simply wanted to check the spelling of someone's name, but instead of giving you this information, the switchboard transferred you to that person.
- Explained to a receptionist that you spoke to person A in that company earlier, and now you need to speak to person B—but you're transferred back to person A anyway.
- Called a technical support help line and started explaining the situation, but before you could finish, the tech started giving you an answer (which most likely was totally irrelevant to your situation).
- Reached a switchboard after transferring out of someone's voicemail and tried to explain that you wanted to speak to an assistant (or other live person in that area), but before you could do so, you were put *back* in the person's voicemail.

Think about how annoyed you were when you were treated in this manner. Chances are that this way of communicating irritated you even if the other person was able to resolve your issue or problem. And if they failed, your irritation was probably even greater.

Why do we have this tendency to interrupt? A major reason lies in the different speeds at which we talk versus think. Nichols and Stevens, in a classic *Harvard Business Review* article, described this phenomenon. The average person speaks at a rate of about 125 words per minute. However, the human brain can process information at a significantly faster rate. The resulting impatience causes the listener to go off on mental sidetracks unrelated to the topic of discussion. Although the listener may catch himself or herself and return to the conversation, the speaker has moved ahead by that time. Catching up is hard, so the listener becomes tempted again to take a mental detour. As a result, the average listener may hear and understand only about half of what the speaker says.

Information lost, projects derailed

Besides annoying people when we interrupt them, we can miss important information ourselves. According to a study that appeared in Application Development Trends, 63 percent of the reasons for IT project failure relate to the requirements phase of the systems development cycle (incomplete/changing requirements, lack of resources and unrealistic expectations, lack of user involvement, and poor planning and unclear objectives). In other words, the application developers often assume that they know what the user wants. The result is usually a system that has incorrect or incomplete function, is late, or is over budget.

When—and how—to interrupt

What about long-winded people who talk endlessly about everything? Such people can take up valuable time, and we often just want them to get to the point. If you feel that you must interrupt that type of person, consider this approach:

- Tell the person what you think he or she "ultimately" was going to say (in other words, cut to the chase).
- Check with the person to see how correct your assessment was.

This technique lets you take control of the conversation but still allows the other person to respond. It gives you a way to hint that you want the person to get to the point, but it also gives him or her a chance to either to confirm or refute your understanding.

When listening to others, the best approach is to listen to everything they say, if possible. If they go on a little too long, you can try to politely interrupt them and summarize what you think their main point is. The worst approach is to interrupt just to make your own point, without trying to determine what their point was.

How can you prevent others from interrupting you?

#1: Phrase your comments so that they grab the interest of the other person. In the 1987 James Bond movie *The Living Daylights* (the first one starring Timothy Dalton), our hero tells a group of Afghan fighters that criminals are selling arms in their area. When the fighters laugh at him, Bond reminds them that those arms could be used against the fighters, at which time they stop laughing and pay attention.

In the example of *Californian* and the iceberg warning, perhaps that sender would have been more successful if he had said instead, "Say old chap, we're wondering if you might be running into icebergs, because we're surrounded by them."

Speakers and writers refer to this device as a "grabber." This column, for example, uses the *Titanic* story as its own grabber.

#2: Anticipate how the other person might interrupt. Say you're a frontline help desk person who is escalating a trouble ticket to your level 2 or level 3 group. Think about the standard questions they might ask—and have answers ready. For example, you might say, "I confirmed that the user has the latest patches, that the configuration files are correct, and that the system has power." If you tell people what they need to know up front, you reduce the chance that they'll jump in and interrupt you before you've had a chance to give them the complete story.

#3: Refuse to be interrupted. If, despite your best efforts, someone interrupts you anyway, there's no need to become irritated or upset. All you need say to that person is, "Please let me finish." Repeat this phrase as often as necessary.

Your customers could be smarter than you think

When I was 14, I couldn't believe how ignorant my father was.
By the time I turned 21, I was astounded at how much the old man had learned in just seven years.

—Mark Twain

We've all heard those jokes about stupid customers and the help desk:

- "I'm having trouble finding the key that's labeled *any*."
- "Having the coffee cup holder in the PC is a great idea, but can you make it bigger?"

Entire Web sites have emerged, documenting such stories. Although we're tempted to laugh, such humor involves risk. Customers may find out, become upset, and speak to your boss. Does that mean you should never laugh at a question? No. But it does mean, when possible, you should think about what's behind the question and try to laugh in the right way.

Try giving your customer the benefit of the doubt. In fact, your customers (like Mark Twain's father or the TV detective Columbo) might just be smarter than you think. Let's take a closer look.

There could be a valid reason for the question

Have you ever seen the optical illusion of a drawing of a woman? Looking at it one way, she seems to be an older woman. Looking at it another way, she seems to be a younger woman. Different people interpret the drawing differently. This idea applies to those questions you receive. Although you may not realize it immediately, there actually could be a valid reason for the question.

What's supposed to happen vs. what's actually happening. Suppose the caller asks, "When I click on the icon for Microsoft Word, should I end up with a blank document?" Now, everyone knows that's what happens, probably including your caller. But what if the caller clicked on the icon and nothing happened? Wouldn't that explain the question? In other words, it's not ignorance of what's supposed to happen, but concern over what failed to happen. (The caller might more accurately have said, "*shouldn't* I end up with a blank document?") In that case, a good response might be, "Yes, that's right. It sounds like you're getting something different, though."

By using this response, you've moved the conversation ahead, and more important, impressed the caller with your insight.

Knowing the concept without knowing the term. The first time I saw the term "breadcrumb navigation," I scratched my head. Then, after Googling the phrase, I learned that it's a reference to displaying, at the top of a Web page, your location relative to other Web pages. This display allows you to go backward by clicking on the display rather than using your browser's "back" button. I knew how to use those links to back up. I just didn't know that the technique was referred to as breadcrumb navigation.

If the caller asks what a term means, it could be simply that he or she just hasn't associated a familiar concept with a particular term. If that's the case, try giving a brief explanation, but also relate it to an example that uses or incorporates the term.

Knowing the concept by a *different* term. As a variation, maybe the caller knows the concept and a term for it, but it's a different term from the one you or your co-workers use. A soft drink might be called "soda" or "pop," depending on the part of the country you're in. So maybe instead of "breadcrumb navigation," the caller is used to the term "Hanseling and Greteling." Bear in mind that if the caller is unfamiliar with a term you use, it doesn't mean he or she is stupid. The caller might know that term by a different name.

Consider the different levels of specificity

A person may be asking for more specific information than you think. In an early scene from the movie *The Sound of Music*, Maria has just been "dismissed" by the Captain and told to leave. As they stand on the back porch, the Captain, hearing a sound, asks Maria, "What's that?" When Maria replies, "It's singing," the Captain, with exasperation, says, "I know it's singing, but WHAT are they singing?"

A question that may sound stupid on one level may not be stupid at all on a more specific level. Suppose you and a customer are looking at a PowerPoint file, and the customer asks, "What are we looking at?" He or she might be asking more than whether the software is PowerPoint. The question really might mean:

- Which *version* of PowerPoint (2007, 2002, 2000, or 97)?
- Which *presentation* or which version of the presentation?

In all of these cases, it's a good idea to avoid being fixated on the apparent stupidity of the question. In other words, *let it go.* Focus instead on the idea that the caller has a problem that needs to be resolved. The less time you spend thinking that the customer is stupid, and the quicker you start problem resolution, the better off your customer will be.

Laugh WITH, rather than AT customers

Suppose the question or comment really is funny? What do you do? If you find that you *have* to laugh, the best way to do so is to laugh with—not at—the customer. Might the customer still get upset? Perhaps. But if you laugh at them, the chances are even greater.

For example, how could you handle the CD/DVD drive/coffee cup holder confusion? A suggested approach:

- Address the confusion directly by saying, "Oh, the device that slides out and in is a drive for playing CDs or DVDs. It's not a coffee cup holder."
- Acknowledge that the confusion is (somewhat) reasonable: "Yeah, I guess it kind of looks like it could hold a coffee cup." However, don't lie about it. If the comment or the misperception is really out in left field, don't say that anyone could have made the same mistake.
- Consider sharing some similar mistake or confusion you had in the past, for example: "You know, for a long time, I didn't realize that the computer was shut off via a Windows command. I would always turn the switch off manually."

The best outcome is for the customer to start laughing at his or her mistake. At that point, you can join in, because it's clear that you're laughing together.

IT pros: Avoid becoming a human OS/2

Now that Microsoft Vista has officially been released, let's talk about... Windows 3.0.

Yes, Windows 3.0. We can learn much from that product, even though it came out more than 15 years ago. Its main competitor was Operating System/2, or OS/2 for short. Similarly, in the world of videotaping, the main competitor of VHS was Betamax. Now, take a look at your keyboard. Chances are the top row of letters starts with QWERTY. At one time, the main competitor of the QWERTY keyboard was the Dvorak keyboard.

OS/2, Betamax, the Dvorak keyboard: What do they all have in common? Although technically superior to their competing products, they failed to gain market acceptance—a reality that IT pros can apply to their own careers.

Success = More than tech skills

Do you think your technical skills alone will ensure your career success? Do you view customers as idiots who get in the way of your work? If so, stop and take stock. With that attitude, you run the risk of becoming a human OS/2, Betamax, or Dvorak keyboard.

Communications skills and the ability to work well with people are as important as technical skills, if not more so. Recently, *CIO* magazine ran a survey of its readership, asking them what three skills they believed their staff needed most. Seventy percent of the respondents named "communications" as one of those skills. When you think about it, doesn't this response make sense? Technology evolves—witness the changes just with respect to

Windows. Do you remember the first PCs? Some of them didn't even come with hard drives, but merely 180K drives that took the old 5 1/4-inch floppy disks.

However, even though technology changes, the importance of communicating effectively with others (particularly customers) remains constant. Users still have their system requirements, as clear as the Mississippi and as ever-changing as New Mexico weather. They still have that printer that won't print, which they need you to fix *right now*. They still don't understand why they have to call the help desk instead of just pulling you aside when you drop by to fix their co-worker's system.

I know that working with customers can be challenging. You can't live with them, you can't live without them. But think about it: What would you rather be doing? Would you rather be setting up a router, testing that application, resolving that help desk ticket? Or would you rather be sitting in your boss's office explaining why Pat in Accounting is all upset? In this column, I'm going to offer some advice aimed at helping you maximize the former and minimize the latter. I'm going to be writing about customer service issues and sharing tips and advice based on my experience and mistakes, as well as what I've learned from others. My goal is to help you reduce the chances of a bad situation or at least mitigate an already-bad siNow that Microsoft Vista has officially been released, let's talk about... Windows 3.0.

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Am I minimizing the importance of technical skills? Of course not. What I am saying, though, is that relying entirely on technical skills for career success is dangerous and ill-founded. I'm also saying that if you do a good job communicating with customers, they'll often cut you more slack when you're trying to resolve a problem for them.

Protect your organization against pretexters with help from Sun Tzu and The Art of War

In 1978, Security Pacific Bank in California lost $10 million to an employee who used ruses to trick the bank into wiring the money into his Swiss bank account. More recently, Hewlett-Packard gained nationwide notoriety in its attempts to uncover "leaks" by its board of directors to major newspapers. The company engaged private investigators, who approached the telephone company. Pretending to be various members of the board, the investigators requested, and in many cases received, the confidential telephone records of the members they were pretending to be.

These incidents have something in common. They all illustrate the loss of property to an attacker who used neither a gun nor a computer. In each instance, the loss occurred because someone was deceived, someone failed to follow a procedure, or someone ignored a safeguard. The act by which an attacker convinces a person in a company to give up confidential information or take an action that compromises company security is known as "pretexting," or "social engineering." Consultant Kevin Mitnick, a former computer criminal who now advises companies on protecting themselves in this area, defines it as "getting people to do things they wouldn't ordinarily do for a stranger."

Pretexting poses a major problem for companies today. The loss of data can not only hurt a company competitively, but it can also can expose the company to legal liability and cause huge negative publicity. Unfortunately, advanced hardware and software security systems can still be defeated, even if unintentionally, by humans within that company.

This issue illustrates the dilemma that companies and their employees must deal with when faced with a request from someone unknown, who could be either a legitimate person or a pretexter. In the interest of "customer service" or "being nice," they might comply with every request—but in doing so, they run the risk of enabling an attacker to steal valuable assets.

The good news is that through awareness and training, employees in a company can become more resistant to pretexting attacks.

Lessons from The Art of War

Several thousand years ago, the Chinese military strategist Sun Tzu wrote his classic work The Art of War. Despite its age, this book still receives attention from officers of the U.S Marine Corps and students at the U.S. Naval Academy. Indeed, this book has relevance in resisting and defeating pretexting attacks. Among his many principles, Sun Tzu expressed three that particularly relate to this topic:

- All warfare is based on deception.
- If you know the enemy and know yourself, you need not fear the result of a hundred battles.
- We impose our will on the enemy, but do not allow the enemy to impose his will on us.

Let's examine these principles more closely and develop some practical rules based on each one.

All warfare is based on deception

Things may not be what they appear to be. Unfortunately, the desire to be helpful and trusting leads people to give out information to those they don't really know. Just because someone says he or she is from the same company doesn't necessarily make it so.

Rule 1: Don't trust caller ID

"Well it's easy to tell where the caller is from," you say. "All I have to do is check my caller ID screen. If they say they're from the company, but the phone number is different, it's a dead giveaway."

Don't be so sure. Numerous calling cards, available on the Internet, allow a person to spoof a caller ID screen. That is, the calling card allows the caller to specify the number that appears on the screen. For example, someone calling from a telephone in Los Angeles (area code 213) can specify a display number for Washington D.C. (area code 202). With such a card, a caller could make it look as though he's calling from another office of a company when really he isn't.

Rule 2: Don't rely on what an untrusted source says or implies

In his book The Art of Deception, Mitnick tells how a security guard at a manufacturing plant encountered two young men on the premises late at night. Though neither of them had company identification, they did give the guard the name of their supervisor. After all three returned to the security office, the guard called the supervisor and asked her about the two young men. The supervisor asked to speak to one of the men, and the guard gave him the telephone. After speaking with the supervisor and apologizing for bothering her, he explained his reasons for being at the plant, listened for a few moments, said good-bye, and hung up.

The men then asked if they could continue their visit and whether the guard wanted to accompany them. The guard told them they could leave but next time to bring their badges and to let the security department know if they would be visiting after hours.

About 10 minutes later, the supervisor called back. She was surprised and confused by the man she had been talking to, who didn't listen to her but merely continued speaking. The security guard immediately put out an alarm, but by that time the two men already had left.

What happened? The two men were impostors. Neither of them really knew the supervisor. Because the security guard could hear only the young man and not the supervisor, he had no idea that the supervisor was perplexed and confused during the call, and that the young man was totally ignoring the supervisor's questions. By talking the way he did, the young man deceived the guard.

The guard could have handled the situation better in these ways:

- He could have kept control of the telephone and simply relayed information from the young man to the supervisor.
- Before handing the telephone to the young man, he could have told both the supervisor and the young man that he needed to speak to the former after they finished their conversation.
- The guard could have called the supervisor back to check on what the supervisor and the young man said.

These three alternatives have one thing in common: They involve confirmation directly with a trusted source (the supervisor), rather than via an untrusted source (the young men). Unless you verify that a requester, visitor, or caller is legitimate, distrust anything associated with that person. Such items include their representation of what a trusted source says (such as in the above example), telephone numbers and e-mail addresses, and software.

If you know the enemy and know yourself, you need not fear the result of a hundred battles

This Sun Tzu principle is perhaps his most famous one. Success in fighting a pretexting attack requires not only that we know our own strengths and weaknesses, but also those of the pretexter. The more we can understand how such a person thinks and acts, the better we are able to prepare for an attack. Police officers and detectives are often taught to think like a criminal when solving crimes.

Rule 3: Effective policies cause minimal offense to legitimate requesters but can potentially deter pretexters

Think of all the ways a company employee can respond to a request for information without knowing the legitimacy of the requester. They include:

- Option A: Singing a song
- Option B: Giving out the information
- Option C: Punching the requester in the nose (if requester is in front of the employee)

Option A safeguards company information from a pretexter but does nothing for the legitimate caller. Option B is the "helpful" approach, but unfortunately gives the pretexter information he/she isn't supposed to have. Option C protects company information and would stop a pretexter but would offend a legitimate requester.

We're looking instead for responses that satisfy two objectives:

- Minimal inconvenience/annoyance/offense to legitimate requesters
- High probability of deterring pretexters

None of the three options above meets these conditions. What about this response: When a caller asks for information, tell the caller that you need to put him or her on hold, make sure it's okay with the caller, then do so. Most likely, a legitimate caller will be patient enough to wait. However, a pretexter might become anxious, thinking that he/she is about to be discovered, and will hang up. This strategy may not always work, but it's a good one to try.

Rule 4: Effective policies incorporate features pretexters are known to dislike

In describing his techniques for dumpster diving (that is, rummaging through discarded trash in search of information), Mitnick told the audience that he explicitly avoided trash bags that appeared to have liquids inside.

How can you use this insight? I'm not suggesting that you dump a gallon of water into your trash, because your custodial staff will justifiably be upset. However, could you perhaps throw in a few damp paper towels at the top of the bag, before sealing it? Perhaps a pretexter, upon seeing those damp towels, will skip that bag.

Likewise, think of other practices that pretexters would dislike and incorporate them into your security plan.

We impose our will on the enemy, but do not allow the enemy to impose his will on us

When he was teaching me to play chess, my father said that if I was moving my pieces simply in reaction to how he was moving his, I was in trouble. He said that in chess, I should be striving to take the offensive and attack, so that my opponent would be reacting to me, not the other way around.

So too in warfare and in dealing with pretexters. A common way of gaining information improperly is for a caller to pretend that he or she is well connected—for example, a friend of or a consultant to a high-level executive. Through bullying or threats, the caller tries to get the employee to give out the desired information.

Rule 5: You, not the caller, are in control

Suppose you get a call that demands you give out information to a friend of the CEO. In listening to the request, remember that you are in control of the information. Possession, as the saying goes, is nine-tenths of the law. Your possession of the information puts you in a stronger position than that of the caller. Don't be cowed by callers who appeal to authority.

Rule 6: Use diplomacy and tact in declining a request

Dealing with potential pretexters calls for diplomacy and tact. Yes, you can tell a requester to "buzz off." What happens, though, if that requester really is the best friend of your CEO?

The way we say something is as important, if not more so, than what we say. For this reason, think about how you can make your statements sound better, even if you must decline a request. Consider the following examples:

Instead of	**Consider**
"I can't give out that information without authorization."	"I'm sorry, but I need authorization before I can give out that information."
"You could have forged the signature."	"We've had issues previously with forged signatures."

An effective technique is to express sympathy while rejecting the request. For example: "I'm sorry, I'd really like to help, but I'm limited in what I can do."

Rule 7 (for management): Support your staff when they follow policy

The Duke of Wellington, who defeated Napoleon at the Battle of Waterloo, was passing through the countryside once when he came upon a closed gate guarded by a boy. "Young man," said the Duke, "Open this gate so I can pass through." The boy replied, "I'm sorry, but my master gave orders that no one is to enter." The Duke then said, "Young man, I am the Duke of Wellington. I demand that you open this gate." Again the boy replied, "My master has ordered that no one is to enter."

At this statement, the Duke exclaimed, "I commend you, young man. If I had a dozen men like you, I could conquer all of Europe."

To the managers and executives who are reading this article: Would you support your staff for standing up to a caller the way this young boy stood up to the Duke of Wellington? Presumably, you have a policy in place regarding verification of callers, no matter who they claim to be or to know. If your staff members believe they will be punished or fired for following your policy, they will be reluctant to enforce it.

Additional resources on pretexting

- 10 common social engineering ploys... and how to protect against them
- 10 ways to avoid being the victim of identity theft
- Out of the shadows, a pretexter's tale

- The threat of social engineering and your defense against it
- Change your company's culture to combat social engineering attacks
- Knowledge is power against these new social engineering schemes

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Poor telephone habits can drive customers away

Telephones seem to generate a considerable amount of frustration among my clients, students, colleagues, and those who read my column. Here are a few tips that can help reduce the chances of annoying or alienating your customers with your telephone habits.

Speakerphones

Use speakerphones with care. Sure, using the speakerphone lets you do other things while talking. But remember, the speakerphone allows others at your end to hear the call — a fact that might bother the person on the other end of the line. In addition, using a speakerphone might offend the person you're talking to, giving the impression that you're too important for him or her.

It's okay to use a speakerphone in certain cases, such as when you've called a number and the phone is ringing or the automated system has put you on hold (along with that irritating music). Because you're not talking to a "live" person, and as long as you keep the volume to a reasonable level (so as not to bother your officemates), using the speakerphone should be fine. However, once someone comes on the line, be prepared to abandon the speakerphone in favor of the handset.

Here are some basic speakerphone etiquette rules:

- Ask permission from the caller and explain why you need to use the speakerphone. For example, perhaps you are attempting to resolve a technical problem and would like the caller to talk to your staff at the same time. Once people realize what's in it for them, chances are they'll go along.
- Identify others at your end who are listening.
- Make sure the volume is reasonable, or even better, conduct the conversation in a conference room or private office, rather than an open cubicle or desk.

Answering the phone during meetings

Have you ever wondered about people who answer the phone by telling you, "I can't talk right now, I'm in a meeting?" I'm tempted to ask them, "Well if this meeting is so important, why did you answer the phone in the first place?" If you're in a meeting and you answer the phone and make this statement, you probably will similarly annoy not only the caller, but other people in the meeting with you.

So how do you handle the situation where the phone rings when you're in a meeting? Probably the best thing to do is let the call go into your voicemail or let your assistant answer, if you have one. If you are expecting someone to call you as part of the meeting, do the following:

- Tell the other people in your meeting about this fact.
- If the "wrong" person calls, apologize and explain that you were expecting a call into the meeting from another person. This resolves the "why did answer in the first place?" question for that caller and reduces the chances that you'll create a negative impression.

Speak softly in a common office area

Theodore Roosevelt said, "Speak softly and carry a big stick." I'm saying, "Speak softly when you're in a common area of the office." The typical example is the help desk area, in a large room with a number of cubicles or desks. Be careful about talking too loudly when you're around the on-duty staff. The people the staff members are talking to might be able to hear your background conversation. In particular, if you're talking (possibly negatively) about a particular customer, and that customer happens to be on the phone with a staff person, there could be a problem.

Finish talking before you pick up or hang up

Callers should receive your full attention. Therefore, before picking up the phone, finish any conversations you're having with a co-worker. Don't pick up the phone while talking to that co-worker. The caller might be annoyed by hearing the tail end of that conversation. If that other conversation concerned that caller, and the caller hears it, you might have a huge problem.

Similarly, after saying good-bye to a caller, keep your mouth shut until you hang up the phone. Refrain from making comments about the call, or more seriously, making negative comments (typically, one-word expletives) about the caller, as the handset is being replaced. Chances are, the caller will hear you.

Conference calls

A few years ago, two male workers at Philadelphia Gas Works (PGW) were dismissed following a conference call with their female supervisor. The two workers were in one location and the supervisor was in a different location. The workers, believing the call had ended, began making negative comments about the supervisor. Unfortunately, they either neglected to shut off the telephone system or thought incorrectly that the system had shut itself off. The supervisor heard everything said about her, and she took action.

Make sure that when you leave a conference call that you really HAVE left it. Be careful to hit the right buttons to disconnect you from the call. Otherwise, you may suffer the same distress as the PGW workers.

Conversely, be aware that others on a conference call might only appear to have left. I heard once about a person who said good-bye to everyone on the call, but instead of hanging up (or hitting the hang-up or disconnect button), he hit the Mute button. Everyone thought he'd hung up because they couldn't hear him or others with him. However, he could still hear *them* and gained valuable information, though underhandedly.

A little caution, consideration, and common sense will go a long way toward saving you from embarrassment and preventing your customers from becoming irritated.

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10 e-mail habits that waste time and cause problems

Few communications tools give you as much exposure as e-mail. Unfortunately, mistakes in your e-mail will receive that same exposure as well. Depending on who sees your e-mail, your job, reputation, or career could suffer. Fortunately, avoiding these mistakes is easy. Here are five e-mail habits that annoy me (and maybe you as well) and what you can do differently.

#1: Vague or nonexistent subject line

Professor Woodward, who taught me contracts last year at Temple University Beasley School of Law, gave me one of the most useful pieces of advice I have ever received. “When arguing a case,” he often said, “make it easy for the judge to rule in your favor.”

Apply that same principle to e-mail. That is, make it easy for recipients to know what your message is about. If you’re like most people, you have an in-basket that summarizes your incoming messages, probably by date, sender, and subject. Don’t you love it when you can get the information you need simply from the subject line? The sender has made it easy for you and has saved you time.

On the other hand, how often have you received an e-mail without a subject or one that’s labeled, for example, “Phone number you requested.” Why couldn’t the sender have said, right in the subject line, “The phone number is xxx-xxx-xxxx”?

When sending an e-mail that concerns a particular person, give details in the subject line, along with the name. For example, if Joe Brown has been promoted, make your subject line “Joe Brown has been promoted.” Do not use only the name as the subject. If you send out an e-mail with just the subject “Joe Brown,” recipients may mistakenly believe that Mr. Brown has passed on.

In the event you do need to transmit such sad news, be explicit. For example, say “Joe Brown RIP” or “Passing of Joe Brown” or “Joe Brown [year of birth] - [year of death].”

#2: Changing the topic without changing the subject

Have you ever read an advertisement for an item that’s on sale, then gone to the store only to discover that that item is sold out? By law, the store has to give you a rain check, because of abuses in the past. In the old days, the store would simply try to sell you something else instead, a practice known as “bait and switch.”

E-mail users employ bait and switch all too often, usually out of laziness. For example, you send a note to a co-worker about subject 1. That co-worker later needs to send a note to you on subject 2. However, instead of creating a new note and labeling it "subject 2," he or she simply replies to you, discusses subject 2, but keeps the subject line as "subject 1." Annoying, isn't it? When you send e-mail, make sure the subject line matches the actual subject. If you're going to send a note via a reply, change the subject line to match the actual subject.

A few months ago, during a period of really cold weather, a neighbor sent an e-mail to all the residents of our development regarding a neighborhood telephone directory, and titled it "neighborhood directory." A half hour later, I received a reply-to-all message from another neighbor with the subject "Re: neighborhood directory." When I accidentally clicked on that message, I read that the sender's heater had broken and that he was asking to borrow blankets and kerosene heaters. He did get what he needed and did later get his heater fixed. However, had he given his note a better subject heading, he might have had a faster response.

#3: Including multiple subjects in one note

Covering multiple topics in one note involves less sending and hence less e-mail traffic and volume. However, your recipient might overlook one or more of those topics. It's better to keep to one topic per message.

#4: Sending before thinking

When you were small, your mother probably told you to count to three before responding to someone (mine told me to count to 10). Why did she say that? She knew that answering before thinking can lead to problems.

Make sure you really mean to say what you've written. People can interpret your words differently from what you meant. A statement made in jest to someone via e-mail may have a greater chance of being misinterpreted than one made in person. Also, be careful about reacting and replying too quickly to an e-mail that upsets you. As Proverbs 12:16 says, "A fool shows his annoyance at once, but a prudent man overlooks an insult."

I'll talk more about it in a future article, but legal implications offer another reason to think before sending. E-mail can be subject to "discovery" by attorneys for a party that might be suing your employer. That is, the things you write in your e-mail could end up in the hands of those attorneys and could be used as evidence against your company in a trial. So before you send an e-mail, imagine that you're on a witness stand having to explain it.

#5: Inadvertent replying to all

Before hitting Reply To All, make sure you really need to do so. Does everyone need to see your response? Does your response benefit everyone else? Or are you sending merely a private response or addressing a personal issue with the sender? In these situations, it's better just to do a simple Reply. Otherwise, your private disagreement becomes public (and embarrassing) knowledge.

Be aware that if you receive a message because you're part of certain message groups (e.g., a Yahoo group), your reply might go to everyone in the group even if you just hit Reply.

Do you recognize yourself in any of these mistakes? The good news is that once you recognize these issues, it's easy to address them.

#6: Omitting the context of a reply

As long as it's not overdone, including the text of the original message in your reply can help the original sender understand your response. If all you send back, however, is a "Yes" or "That's right," it may be difficult for the sender to understand your answer. For that reason, it's best to indicate the context of your answer by including the original question.

#7: Shooting the messenger

Though the practice of shooting the messenger occurs more on message boards than in e-mail, it still deserves mention. Here's what I mean by "shooting the messenger":

Person A posts a message or sends an e-mail that quotes person B

Person C

–Receives the message

–Takes extreme exception to the quotation by person B

–In responding to A, attacks A rather than B

If you're person C (the recipient), make sure you make the proper distinction when you reply. Just because A posted the comment by B doesn't mean that A agrees with B. When you reply, address your comments to A. When talking about B, mention B explicitly and do so in the third (rather than the second) person.

Right:

To: A

From: C

Thanks for that note. Yes, I think B is really wrong on that statement.

Wrong:

To: A

From: C

What a ridiculous statement. It's totally wrong.

#8: Misaddressed recipient

A woman and former classmate told me about an incident involving her law school days and then-boyfriend. During a summer job between two of her years in school, she met another young man. One day she wrote a letter to a girlfriend, talking about this new boyfriend. She also wrote a letter to her old boyfriend. You guessed it: A few days later, the girlfriend called and said, "You know, you sent me a letter addressed to Wayne [the old boyfriend]."

Be careful when addressing e-mail, particularly if your software has a "predictive fill-in" feature (as Outlook Express does). As you're typing in a recipient name, the software will complete the entry for you. If it's wrong, and you hit Send without noticing, you will have misaddressed your note. I have, in my address book, an entry for Joy Fellowship. It's a church youth group with whom I have been involved as a leader and to which my daughters belong. I also have an entry for their piano teacher, Joy Kiszely. When I address a note to her, I have to be careful. Because of alphabetization, Joy Fellowship appears before Joy Kiszely does. I haven't erred yet, but it's a real possibility.

#9: Displaying addresses of recipients who are strangers to each other

Were you ever the recipient of an e-mail that had a gazillion other recipients as well? The message header, which had all of those recipient addresses, probably took up half your screen. Besides annoying you, the sender might have compromised your privacy by revealing your e-mail address to all the other recipients.

Don't make the same mistake. If you're POSITIVE that each of your recipients already knows (or could find out anyway) the address of every other recipient (e.g., they're all in your company) and if the number of recipients is fairly small, go ahead and list them. Otherwise, address the note to yourself and put the recipient addresses in your blind carbon copy (bcc) field. Your recipients will not see who received your note, thus saving space and protecting the privacy of each recipient.

#10: Replying vs. forwarding

Didn't you hate it when you were young and your parents talked about you to their friends while you were present? They'd refer to you in the third person, as if you weren't even there.

I thought about that situation last week after talking to a prospective client with whom I had spoken a few months earlier. I sent him an e-mail with links to my TechRepublic articles and blogs. Later that day, I received a reply from him. However, when I opened it, here's what I read:

John,

Despite his claim, I don't remember talking with Calvin before. It may have happened but wasn't memorable.

When you have time, could you read his article and let me know if it is worth doing anything else with it? Thanks.

Of course, the prospective client meant to *forward* my note to John (presumably a subordinate). Instead, he hit Reply, sending his note right back to me. Be careful that you don't do the same thing. If you're writing about person B but sending the note to person C, make sure you do forward (or send) your note to C and that you don't inadvertently reply to B.

By the way, after getting this note, I replied back to the person asking whether the note had been meant for someone else and offering to figure out who “John” was and to send him the note directly. The person replied again, apologizing and admitting that he was poor at multi-tasking.

Ask the right kind of question to get the right kind of answer

“There are no stupid questions,” as the saying goes. Of course, the cynic will continue by adding, “Only stupid people who ask questions.” While I consider that latter view extreme, I do believe that some questions are better than others. Whether you are asking questions of a customer, client, co-worker, or boss, the type of questions you ask can affect how you are viewed. Here are some pointers in this regard.

Distinguish between open and closed questions

A closed question is one that generally can be answered with either a “yes” or “no” by the other person. Examples include “Is your computer powered on right now?” and “Are you running Vista?” Closed questions are good if you want to limit the answers you get from the other person. The danger, however, is that you might miss important information because of assumptions you make when you ask these questions.

Open questions, on the other hand, generally require more than simply a “yes” or “no.” They require an elaboration from the person who is questioned, because that question begins with a “who,” “where,” “why,” or “how”? Examples of such questions would be “What were you doing when the problem occurred?” and “What applications are you running right now?” Although the danger of missing information is smaller, asking such questions can result in long-winded answers.

When doing problem determination, both types of questions play important roles. You might begin by asking the customer about the types of symptoms being encountered. Then, while exploring these answers, you might get confirmation by asking closed questions. The process works in reverse as well. You might get a short answer from the customer and find that you must ask the customer to elaborate.

Avoid plain “definition” questions

My general rule is to avoid asking questions if their answers can be found easily via Google or Wikipedia. Therefore, in history class, I would hesitate before asking, “Who won the Battle of New Orleans?” (The answer is Andrew Jackson, and the battle was notable because it occurred, as a result of communications difficulties, *after* the treaty ending the American Revolution was signed.)

Other questions, however, aren’t as easily answered this way. These questions generally demonstrate insight on the part of the questioner and are preferable to the “plain definition” questions. Thus, with respect to the Battle of New Orleans, a more insightful question might be, “What do you think would have happened if the *British* had won at New Orleans?”

To avoid misunderstanding and misperception, you might want to make clear that you’re asking the second type of question and not the first. For example, you might preface the question above the following way: “I’m not asking who won the Battle of New Orleans, because I know it was the Americans and Andrew Jackson.” Then, proceed with the second question.

Making this distinction is critical if you’re a level 1 IT support person and you’re asking a level 2 person for advice or assistance. You want to avoid giving this impression that you’ve failed to do your homework. So a request for information might proceed this way: “I know what the registry is, and I understand in general that it can be corrupted. What I need to understand, though, is how this particular patch corrupted it.”

Distinguish between “curiosity-based” and “concern-based” questions

People can get defensive over certain questions. But sometimes, they don’t need to because you’re asking a question only out of curiosity, not because you have a concern. Most people would sense a difference between a boss who asks a subordinate, “Why did you move the file instead of copy it?” and a co-worker who asks another co-worker, “Why did you build a patio instead of a deck?” If you’re asking a question simply because you’re curious and not because you have an issue involved with the question, make that point clear when you ask. I would preface that kind of question with the following statement: “I have a question, and it’s only out of curiosity, because I’m not upset about it. Why did [*nature of question*]…”

Anticipate negative reaction to the "dumb questions"

It does happen, doesn't it, that the computer problem occurred because no power was going to the computer? You don't want to spend half a day with a customer on problem determination only to find that this simple solution was overlooked. Both of you might get in trouble. At the same time, though, you *know* the customer might be upset at being asked a patronizing question, important though it might be. In such cases, I recommend apologizing, and using "the system" as your fall guy. For example, you might preface the question with, "I'm sorry, but I have some standard questions I have to ask. I'm sure you've already done this, but we have to make sure. You have checked, of course, that the power is plugged in?"

Another technique is to acknowledge that your question might sound stupid or ignorant, but then immediately make clear why it isn't. Right now, for example, the cost of a first class letter is 41 cents. Therefore, if someone went to the post office and asked for rolls of 39 cent stamps, one might assume the person was unaware of the rate change. To address this situation, here's what the purchaser might say:

"I know the current rate is 41 cents. However, I do want to buy 39-cent stamps if I can, because I have a bunch of 1-cent stamps that I want to use up."

Set up questions regarding the retraction of a request or assignment

Have you ever asked someone to do something, then later changed your mind? A few moments ago, you were hoping the person *would* do the assignment. But now, you're hoping he or she *didn't* do it. If you're concerned about how the other person will react, it's important to understand the dynamics involved with your asking that person about the assignment. Remember, you're hoping that the assignment hasn't been completed yet. But if you simply ask, "Have you done that assignment yet?" the person probably will think, mistakenly, that you *did* want it done. In that case, they might be nervous or defensive about admitting that the work is undone.

However, if your preface your question with, "I'm hoping you haven't done the assignment I gave you, because our direction has changed," the other person is less likely to withhold information about the missed assignment. By the way, if he or she already did do that assignment, you probably should apologize and say thanks.

Of course, I'm not saying you have to use these techniques. I am saying, though, that being aware of them and the advantages of using them can make you more effective and can is likely to affect how you're perceived.

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10 ways to communicate more effectively with customers and co-workers

We all know what happened to the *Titanic*. Clearer communications could have prevented the tragedy and the loss of more than 1,500 lives. Communications plays just as important a role in your careers. When asked to name the top three skills they believed their subordinates need, 70 percent of the readers of *CIO* magazine listed communications as one of them.

Here are some tips on how you can communicate more effectively with people at work, be they customers, co-workers, subordinates, or superiors.

#1: Beware of interrupting

Titanic wireless operator Jack Phillips interrupted a wireless message from a nearby ship, telling them to shut up. In doing so, he prevented that ship from sending *Titanic* an iceberg warning.

Be careful about interrupting others, particularly your customers. They'll be especially upset if, while they're explaining a problem, you interrupt them and start offering a solution. If you feel you *have* to interrupt, at least cut to the chase and tell the other person what you think his or her main idea was. That way, the other person at least can confirm or correct you, and in either case save time.

#2: Listen actively

Did you ever get the feeling, when talking to someone, that you were really talking to a wall? The person may have heard you but gave no indication of it at all. Avoid doing the same thing. When communicating with others, it's just as important that people be *aware* that you're listening as it is that you're actually listening. For that reason, be involved with and react to what the other person is saying, either via a nod, or an "I see," or a paraphrase of the other person's statements. You'll strengthen your own understanding and make a better impression.

#3: Avoid negative questions

Suppose you say to a customer, “You don’t have Word installed?” and he answers “Yes.” What does he mean? Yes, you’re right, Word is not installed? Or yes, he DOES have Word installed?

Asking a negative question creates confusion. It’s clearer if you phrase the question positively (e.g., “Do you have Word installed?”) or ask an open-ended question (”What applications do you have installed?”). If you *must* use the negative, try a question such as “Am I correct that you don’t have Word installed?”

#4: Be sensitive to differences in technical knowledge

Chances are, your customers have less technical knowledge than you do. Be careful, therefore, when explaining things to them. If you use acronyms, be sure you identify what the acronym means. The same acronym can mean different things, even in an IT context (for example, ASP can refer to “application service provider” or “active server page”). Be careful that you don’t make two opposite mistakes: either talking over their head or talking down to them. Keep your eyes on customers when you talk to them and be alert to cues indicating that they don’t understand. Ask them whether they understand what you’re saying, if necessary.

#5: Use analogies to explain technical concepts

A good way to explain a technical idea is to use an analogy. Though they have limitations, analogies are helpful in explaining an unfamiliar idea in terms of a familiar one. One of the best analogies I ever heard compared a firewall to a bank teller. When you enter a bank, you don’t just go into the vault and get your money. Instead, you go to a window, where the teller verifies your identity and determines that you have enough money. The teller goes to the vault, brings it back to the window, gives it to you, and then you leave.

#6: Use positive instead of negative statements

Your customers are more interested in your capabilities than in your limitations. In other words, they’re interested in what you *can* do, rather than what you *can’t* do. The way you say things to them influences how they perceive you and your department. You, as an IT department or individual, can be seen as a roadblock or you can be seen as a partner. So, for example, instead of saying, “I can’t help you unless you log off,” consider saying, “Please log off so that I can help you.” Your statements often will be easier to understand as well.

Here’s another reason to avoid negative statements. Have you ever experienced gaps of silence in your telephone calls, where the conversation breaks up? Usually it happens when using a cell or a VoIP telephone. If the gap occurs as you’re saying “not,” your recipient could get the opposite message from what you intended.

#7: Be careful of misinterpreted words and phrases

Sometimes we say something with innocent intent, but the other person misinterprets it. We mean to say one thing, but our pronunciation or inflection causes us to convey something else. For example, in Chinese, the sound “ma” said in a high level tone means “mother in law.” However, said in a falling and rising tone, it means “horse.”

Be especially careful of the word “you.” Overusing this word can make the person you’re talking to feel defensive or threatened. Instead of saying, “You need to speak louder,” try saying, “I’m having trouble hearing.” Another issue involves the dual meaning of “you.” Unlike other languages, English uses the same word to refer to an actual person (for example, the person you’re talking to) as well as to a hypothetical person. Suppose you said to someone, “You never know what’s going to happen next,” and meant to equate “you” with “people in general.” The other person might think you’re referring to him or her specifically and take offense. A better alternative might be, “It’s really unpredictable here.”

If someone is upset, one of the worst things to say is “calm down.” It might work one half of one percent of the time, but generally all it does is make things worse.

In general, think before you speak. I’m not saying you always have to be polite or diplomatic. Sometimes you do need to (figuratively, of course) beat people up. However, do consider the alternatives before speaking. As the proverb goes, “He who guards his mouth and his tongue keeps himself from calamity.”

#8: Remember that technical problems involve emotional reactions

When customers have a technical problem (for example, they’re having trouble printing), keep in mind that they’ll almost always have an emotional reaction as well. Those emotions can range from simple annoyance to outright panic, depending on the importance of the document and the time element involved. I’m not saying you have to be Dr. Phil, but it's important to acknowledge and recognize these emotional reactions. If all you do is solve the technical problem and walk away, chances are the customer will still be upset.

In these cases, simply saying something like, "Pain in the neck, isn't it?" or "I hate when that happens to me" can help the customer feel better about the situation and possibly feel more positive about you.

#9: Anticipate customer objections and questions

In his book *The Art of War*, the ancient Chinese author and strategist Sun Tzu said, "If you know the enemy and you know yourself, you need not fear the result of a hundred battles." Apply this principle when communicating with customers. In particular, try to anticipate the objections your customers will have to your message and address those objections.

For example, suppose you're sending out a directive regarding the downloading and application of Windows updates. Suppose further that you have customers who know enough to be dangerous. Such a customer might think, "Well, I'm current in my virus definitions, so this update is unnecessary for me." Your communications with such a customer will be more effective if you anticipate and address that issue. Consider, therefore, a sentence such as, "This Windows update is necessary even if your virus definitions are current."

#10: Keep the customer informed

The area where I live, southeastern Pennsylvania, has a large agricultural presence, in particular involving the production of mushrooms. While they are growing, mushrooms are kept in a dark building and are covered with fertilizer.

Your customers will become upset if you treat them the same way. Keep them informed of developments involving them, particularly with regard to technical problems and outages. In particular, keep them apprised even if nothing is going on. For example, let them know you've contacted the vendor but still haven't heard anything back. No news is still news.

If a customer leaves you a request via voicemail or e-mail, let the customer know you received it, even if you are still in the process of handling it. Doing so gives the customer one less matter to worry about.

When a problem is resolved, let the customer know that, too. Nothing is more frustrating to customers than finding out that they could have been working sooner if they had only known.

Calvin Sun works with organizations in the areas of customer service, communications, and leadership. In addition to writing this column, he contributes to TechRepublic's Help Desk Blog. You can contact him at *csun@calvinsun.com*.

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