PRINCIPLES OF ORGANIZATION

Memos to cabinet ministers and senior executives often follow a rigid two-page format with only limited latitude for creativity in organizing your material. This rigidity is adopted deliberately to enable those people and their offices to effectively deal with the massive volume of paper that comes their way every day — all of it as important as the memo you are writing now. You'll find details on this in the sections on Memos and How to Fix a Four-Page Memo.

Briefing notes and briefing books can be significantly longer than two pages. They also provide you a great deal more latitude for organizing your material creatively. Indeed, the added length often demands it. The balance of this section looks at guiding principles for organizing such documents, specifically:

- comprehension span;
- grouping scheme; and
- sequencing.

Organizing your message can be a daunting challenge at times. However, it will be an even greater challenge for your readers unless you do it for them.

Comprehension Span

The organization structure of a message has two dimensions: one horizontal, and one vertical. I'll use the organization chart of a business to show what I mean. Here's what the first few levels look like:
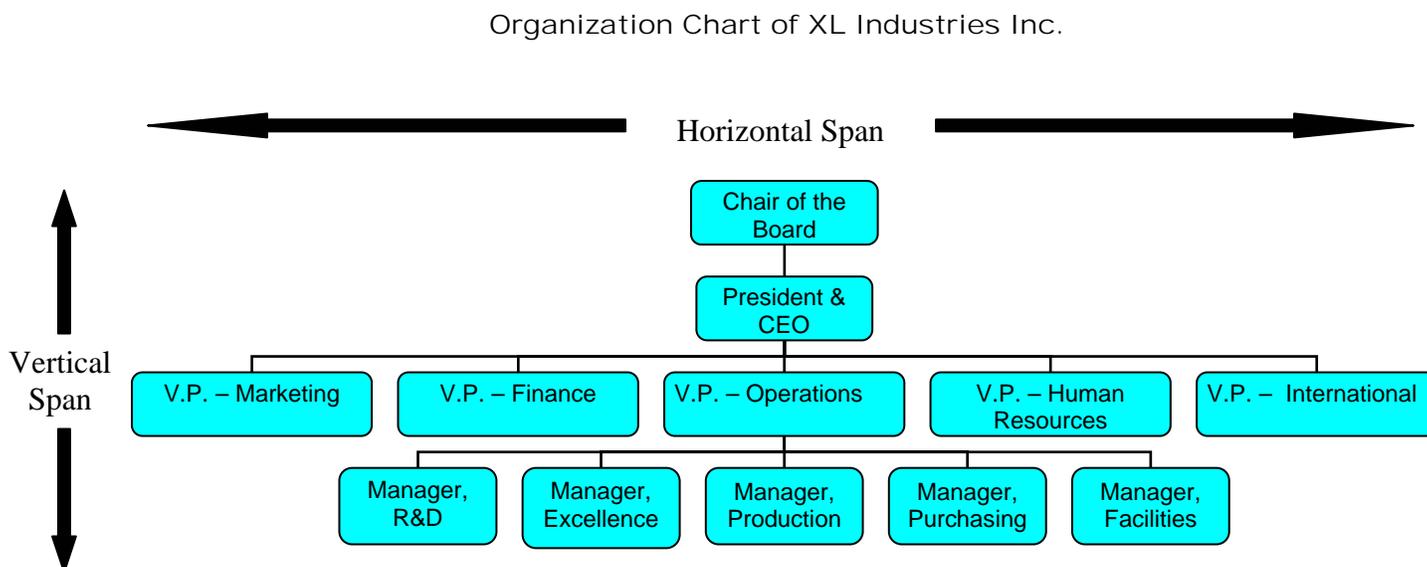
Organization Chart of XL Industries Inc.

Figure 1

In a large multinational corporation, the vertical span might comprise a dozen or more levels and hundreds of thousands of employees. Yet the president manages to keep on top of things because only a handful of people report directly to him or her — each of whom has a well-defined role in managing the next level below — in the horizontal span.

In written material, people's ability to comprehend a horizontal span of concepts varies widely, depending upon the subject matter, how it is organized and how it will be used.

The white pages of the phone book use an organization structure that has only two levels vertically. The first level is the title: "White Pages". The second level, the listings, could include millions of distinct items horizontally. Dictionaries are another example of such a two-level structure. In both cases it works, because of the way people use these documents.

A narrative report, however, would be useless if it followed similar principles. It would be possible to give each paragraph a label and arrange them all alphabetically. But if you presented your readers with a continuous list of such paragraphs — even with nice neat headings — they would be baffled.

For a narrative report, you will need to design a hierarchy of details in a pyramid-like form — much like the organization chart of XL Industries in Figure 1. I aim to limit things to a horizontal comprehension span of seven or eight items at a given level of detail — seven or eight sections, seven or eight sub-sections in each section, seven or eight paragraphs in each sub-section, etc. Much more than that, and I will lose my readers.

In contrast, the vertical comprehension span of such a report can be infinite, provided the information is grouped in a rational scheme that is attuned to user needs. The classification systems used by librarians are examples of how millions of volumes can be organized this way.

Grouping Scheme

You will need a well-designed grouping scheme in order to develop viable horizontal comprehension spans for reports and briefing material.

To keep your readers' attention, you need to group your concepts in a way that helps them to see a useful pattern and that serves the objective of your message.

Any given text can be grouped, or labeled, in more than one way. The sections on grouping schemes for sample messages on sports and trees show how this is done. The section on Abstract vs. Concrete provides more details on the concept of labeling.

You may also find that you need to develop a grouping scheme within a grouping scheme. This concept is discussed in the section on Grouping Scheme Overlays.

Sequencing

Once you have a grouping scheme for your material, you will need to decide how to sequence it. At any given level, what comes first within the group? What comes next? What comes last?
It is useful to consider how readers absorb material. A general rule of thumb is that what is placed first is the most likely to get the audience's attention (or least likely to be overlooked). What comes last is the next most likely to get the audience's attention. What's placed in the middle is least likely to get attention.

Thus, one criterion for sequencing could be importance, e.g.:
- what are you most anxious or least anxious to convey to your audience;
- what is the most difficult issue and what is the least difficult; or
- what will have the most positive impact on an audience and what will have the least.

However, many other factors may come into play in deciding upon your sequence. Here are some examples:
- logical progression from premises and observations to conclusions (or vice versa);
- geographic sequence (e.g. progressing from eastern areas through central areas to western areas);
- chronological sequence (e.g. what happened/will happen first, what happened/will happen next, what happened/will happen last); or
- numerical sequence (e.g. most expensive first and least expensive last, or vice versa).

Those examples are just a few of the many criteria that you might use. Your imagination is the only limit to criteria that could be used for sequencing.

The section on Sequencing gives examples of this in practice.