



Translation Tool Box

**7 techniques to help you convey
technical concepts**

motem.

When to use this?

- **You're sitting down to write your report with a number of technical concepts to convey**
- **You're preparing for a meeting and want some go-to methods to communicate**
- **You've written your document and you want to check that you've pitched it correctly,
tip: run the readability test.**

**In order for someone to listen to us or read our work,
we need their **attention...****

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We naturally pay attention to things we care about...

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Here are 3 things we ALL care about...

1. Problems we want to solve

2. Results not process

3. The future – improving or securing it

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**Before you start writing or speaking,
check you've adopted the right mindset...**

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Mindset check



- 1. Know your audience**
- 2. Hold them in your mind when you write**
- 3. Communicate to be clear not clever**
- 4. Clear writing comes from clear thinking**
- 5. Assume intelligence not experience**

7 tools for translating technical concepts...

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TOOL 1: IN or OUT?

Does your
reader **care**
about this
concept?

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**Remember the 10 reasons clients seek
advice....**

To reduce complexity

To take action

To make better trade offs

To increase confidence

To feel safer

To save time

To offload unpleasantness

To have someone to blame

To make someone else happy

To receive encouragement

If YES...please continue.

**If NO... please don't include it.
Or explain it in the appendix.**

**Soaking up valuable attention on things
your client doesn't care about increases the
chance your report won't be read or your
meeting will be perceived as boring and confusing.**

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TOOL 2: Start with what it DOES

Focus on what the product/concept DOES, not what it IS.

This means you start with what the clients care about.

For example: compounding...

“I want to explain how you can make your money grow,
while you do nothing (what it does for you)”

NOT

Compounding is the return you get on your original
investment and the return you get on your return.
(what it is)



**“Normally, if we don’t know the gist –
the meaning – of information we
are unlikely to pay attention to its details.”**

John Medina, Brain Rules

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TOOL #3: EXAMPLES ARE ESSENTIAL

Explanations without examples don't work

Use examples, illustrations and comparisons.

Look at this explanation of taking enough risk:

"Without risk, there is no reward (**purpose**).

Without risk, you're stuck in a savings account getting 1% interest on your cash.

This is a bad idea because your pot is being whittled away by inflation which is currently running at 2%. (**comparison**)

You need to take enough risk for your savings to grow over time and beat inflation."

TOOL #4: TOP LINE PHRASES

“The key thing you need to know about this...”

“There are 3 things you need to know about this...”.

“The most important thing about this is...”.

**When we signpost what’s important, our listener’s brain pays attention.
And it also means we’re only telling them key information.**

Tool #5: THE LADDER OF ABSTRACTION

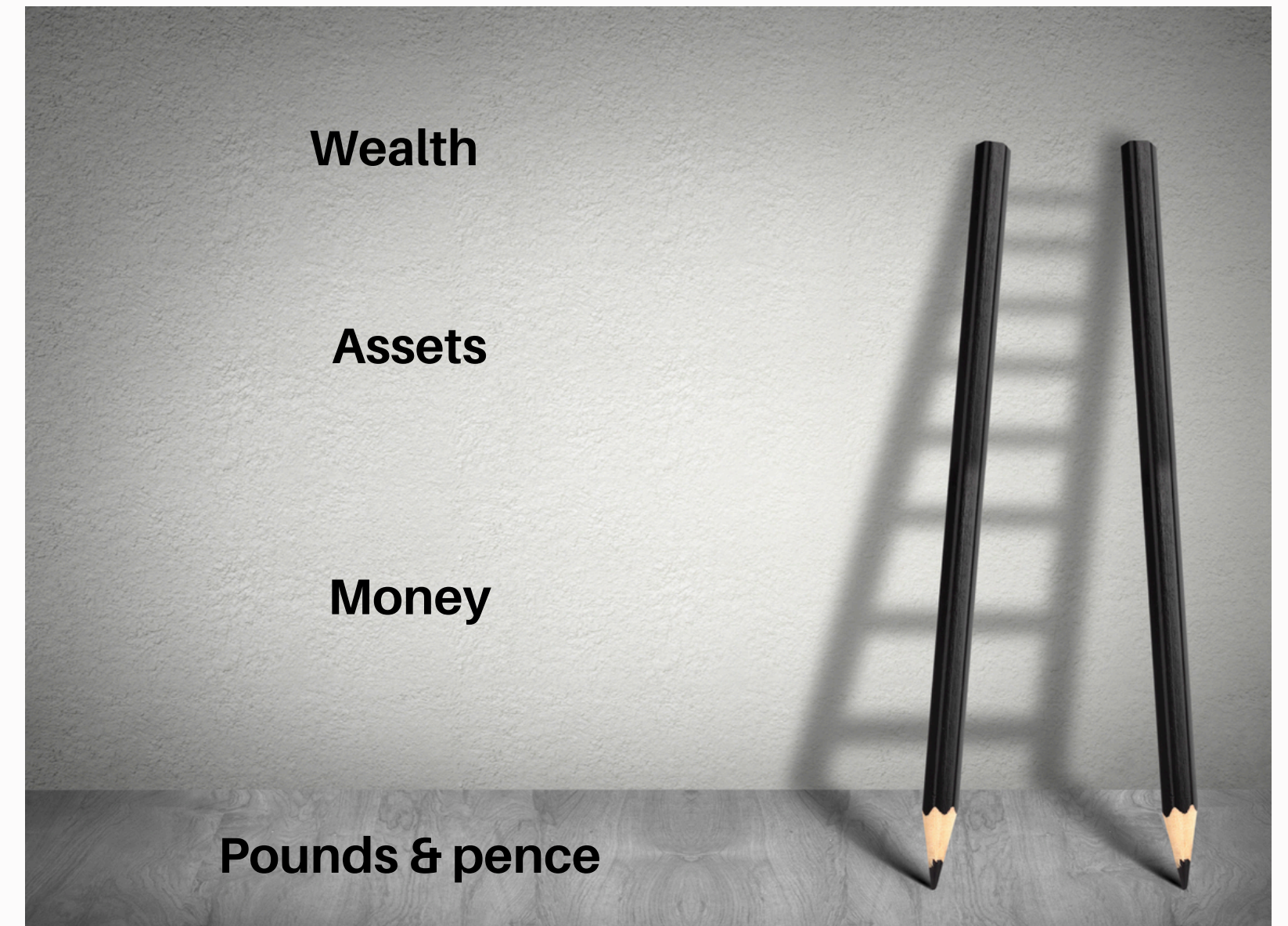
The ladder of abstraction can help you decide which words to use.

Becoming an expert in something means we become more fascinated by nuance and complexity.

This can result in using abstract words (found at the top of the ladder).

But this is hard to understand for someone who doesn't share our knowledge.

So we need to keep our language concrete.
Coming down the ladder of abstraction can help.





Jargon creates distance.

motem.

Tool #6. Use diagrams



Do you want to explain a process?

Do you need to demonstrate different amounts?

Using Smart Art on Powerpoint is really easy.

[Here's a quick demonstration](#)

Other options include:

Powerpoint shapes

Use Canva

Google Draw

Or a simple table shown on the next page
does the trick...

How does Inheritance Tax work?

For example, if your overall (gross) estate is worth £500,000 and you're *not* leaving your main residence to your kids or grandkids, the bill payable by your beneficiaries would be:

GROSS ESTATE	NIL-RATE BAND	TAXABLE AMOUNT	IHT PAYABLE
£500,000	£325,000	£175,000	£70,000 (40% of £175,000)

However, if you left 10% of the taxable portion of this same estate to a charity, you would qualify for the reduced rate of 36% and the IHT bill for your beneficiaries would be:

GROSS ESTATE	NIL-RATE BAND	TAXABLE AMOUNT	DONATION TO CHARITY	NEW TAXABLE AMOUNT	IHT PAYABLE
£500,000	£325,000	£175,000	£17,500 (10% of £175,000)	£157,500	£56,700 (36% of £157,500)

TOOL #7. Use metaphors and analogies

This tool brings **abstract concepts to life**.

They work because we're borrowing something familiar and applying it to this concept, so that the reader gets the gist.

How to use them?

"It's a bit like..."

For example:

A multi asset fund is like, a ready-meal,
rather than preparing all the ingredients yourself. (Boring Money)

More metaphors and analogies...

Hardly anyone knows what a paraplanner is.

You could use a metaphor when you're introducing yourself :

“If the planner is helping you define where you want to get to,
then we act like a sat nav helping you get there
and avoiding roadworks and congestion.

It's our technical expertise that plots the route.”

The Quiet Room use apples, horses and worms to
convey pension options.



Translation Tool Box

7 techniques to help you convey technical concepts:

- #1: In or out?
- #2: Start with what it does/how it helps
- #3: Give examples
- #4: Signpost key info
- #5: Use concrete words: come down ladder of abstraction
- #6: Use diagrams
- #7: Use metaphors and analogies

Further resources....

Checking tool: Readability test

This READABILITY tool helps you determine whether your concepts are easy for your clients to understand.

You'll be given a score which can be anything from simple to very difficult.

Aim for scores of above 60.

Even if someone has investment experience, you don't want to make it hard to understand your advice. Remember, it may also be your client's children reading the report.

If you get below 60:

1. Shorten your sentences and add more full stops.
2. Replace long words (require, terminate, utilise) with short ones (need, stop, end, use)
3. Change passive (The report was written) to active (I have written the report).

Further reading

Books on how we process information

Brain Rules: John Medina

Overcoming the Curse of Knowledge tips:

<http://www.stickyteaching.co.uk/avoid-biggest-rookie-teaching-mistake-much-information-makes-people-gag/#more-81>

<https://hbr.org/2006/12/the-curse-of-knowledge>

<https://effectiviology.com/curse-of-knowledge/>

<https://catherineevery.medium.com/in-defence-of-jargon-and-corporate-gibberish-71ca2622dd9c>

Trust

<https://trustedadvisor.com/why-trust-matters/understanding-trust/understanding-the-trust-equation>

https://trustedadvisor.com/howtrustworthy_infographic

<https://trustsuite.trustedadvisor.com/>

https://trustedadvisor.com/public/files/pdf/2010_TA_Whitepaper_Think_Again_Special.pdf

Further reading continued

Grammar

<https://www.andyoucanstartasentencewithand.com/>

Suitability Reports Good Practice

<https://para-sols.co.uk/2020/06/09/the-report-report-in-which-jo-determines-the-suitability-of-suitability/>

Research on simplifying language:

John Wiley & Sons, Inc.. "The Secret Of Impressive Writing? Keep It Plain And Simple."

ScienceDaily. ScienceDaily, 1 November 2005. <www.sciencedaily.com/releases/2005/10/051031075447.htm>

Tools

<https://otter.ai/>

Otter AI (is an app that allows you to transcribe meetings)

it is easy to record meetings and transcribe these to help how you document what happened. .

Knowing is one thing. But doing is another!

Have your board reports flagged up any readability issues?

Is there room for a little improvement?

If so, consider the Communicate for impact programme.

**It will help you and your teams write emails, letters and reports
that clients WANT to read.**

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