

Chapter 1: GETTING THE MESSAGE ACROSS

Soft Skills: A social, interpersonal, or language skill that complements a person's technical skills.

Hard skill: A technical skill a person requires for a specific job.

The ability to communicate is a soft skill, while the hard skills are tools and techniques that equip people to work in a professional capacity.

Communication: a transactional and relational process involving the meaningful exchange of information

Communication Theory: A system of ideas for explaining communication.

Rhetoric: The use of language to persuade an audience.

Semantics: the study of the words and symbols we choose.

Semiotics: The study of how meaning is assigned and understood.

Cybernetics: The study of how information is processed and how communication system function.

Communication can be understood in terms of being

- **Situated:** (It is embedded in a particular environment or socio-cultural context);
- **Relational:** (it involves the ability to interact effectively and ethically according to what is needed at a given moment); and
- **Transactional:** (it is a cooperative activity in which people adapt to one another).

Message: any type of oral, written, or non-verbal communication that is transmitted by a sender to an audience.

Sender: the participant in the transaction who had an idea and communicates it by encoding it in a message.

Encoding: the act of converting ideas into code in order to convey a written, oral, or non-verbal message.

Channel: a communication pathway or medium over which a message travels.

Receiver: the person for whom a message is intended, who decodes the message by extracting meaning from it.

Decoding: the act of extracting meaning from spoken, written, and nonverbal communication.

Feedback: the receiver's response to a message that confirms if the original message was received and understood.

Noise: any form of physical or psychological interference that distorts the meaning of a message.

Communication Barriers: problems that can affect the communication transaction, leading to confusion or misunderstanding.

Channel overload: the inability of a channel to carry all transmitted messages.

Information overload: a condition whereby a receiver cannot process all messages due to their increasing number.

Emotional interference: a psychological factor that creates problems with the communication transaction.

Semantic interference: interference caused by ambiguity, jargon, language, or dialect differences, and different ways of assigning meaning.

Bypassing: misunderstanding that results from the receiver inferring a different meaning from a message based on the different meanings of the words that are used.

Physical and technical interference: interference external to the sender and receiver.

Mixed messages: conflicting perceptions of a signal or message that may result in miscommunication..

Channel barriers: inappropriate choices of channel that impede communication.

Environmental interference: Interference that results from preconceptions and differing frames of reference.

Dyadic: a group of two.

Overcoming these barriers is a matter of becoming more reflecting about your own communication practices and more responsive to the needs and expectations of your receivers:

- Be timely and time-sensitive.
- Be purposeful
- Be a good listener and a careful reader
- Be context-sensitive
- Be proactive.

Communication Contexts:

Effective communication on the job relies on skills related to the following five forms:

- **Interpersonal communication:**
an interactional process between two people either face-to-face or through mediated forms.
- **Small-group communication:**
in interactional process that occurs among three or more people to achieve common goals

- **Organizational communication:**

communication within a hierarchical social system composed of interdependent groups focused on common goals. This form of communication takes place in large businesses and industries as well as government institutions.

- **Intercultural communication:**

The management of messages between people of different cultures, with necessary adaptation to account for differences between socially constructed forms of communication behaviour.

- **Mass communication:**

an interaction in which a small group of people sends a message to a large anonymous audience; the transmission is indirect, often mediated through radio or television broadcasts, or newspaper or magazine articles.

Non-verbal communication: Communication that does not use the words but takes place through gesture eye contacts, and facial expressions.

Non-verbal communication cues can play five roles in relation to verbal communication:

1. **Repetition**
2. **Contradiction**
3. **Regulation**
4. **Substitution**
5. **Accenting and complementing**

- **Encoding (emotional expressivity)**

The ability to send non-verbal messages accurately to others.

- **Decoding (emotional sensitivity)**

The ability to accurately read another person's non-verbal cues.

- **Regulation**

the ability to control one's non-verbal displays and expressive behaviour to suit social situations. Regulation may require a deeper awareness of the subconscious choices that result in non-verbal displays and the meaning that other people infer from those displays.

Proxemics

The study of the use and perception of space

Chronemics

The study of time in non-verbal communication

Paralanguage (vocalics)

non-verbal vocal qualities of communication.

Paralanguage

- Vocal qualities
- Vocal characteristics
- Vocal segregates

Body language (kinesics)

non-verbal communication conveyed by gestures, eye contact, posture, and facial expressions.

Body language

1. Gestures:
 - a. Emblems
 - b. Illustrators
 - c. Affect displays
 - d. Regulators
 - e. Adaptors
2. Posture
3. Eye contact
4. Facial expressions
5. Image

Internal communication

communication through the channels of an organization

External communication

communication with audiences who are part of an external environment

Essential skills for workplace communication

Active listening

listening that demands close attention to the literal and emotional meaning of a message and a level of responsiveness that shows the speaker the message was both heard and understood.

Cognitive dissonance

the tendency to reject messages based on personal value systems.

Formal communications network:

a system of communication sanctioned by organizational management

Informal oral network

unofficial internal communication pathways that carry gossip and rumours - sometimes accurate, sometimes not (also known as a *grapevine*).

Formal communication channels:

facilitate the flow of information through an organization's hierarchy.

Upward communication flow:

Channels information from subordinates to superiors.

Downward communication flow:

Channels information from superiors to subordinates.

Horizontal communication flow:

enables individuals at the same organizational level to share ideas and exchange information.

Business ethics:

the socially accepted moral principle and rules of business conduct.

Ethical Lapses and why they happen

- **The safety-in-numbers rationalization.**

This is the belief that wrongdoing is not wrong if others happen to commit the same acts.

- **The head-in-the-sand rationalization.**

People sometimes believe that ignoring an ethical problem will somehow make it go away. Out of a desire not to "rock the boat", some people may fail to blow the whistle or adopt appropriate corrective measures when a problem emerges.

- **The between-a-rock-and-a-hard-place rationalization.**

According to this view, infractions are justifiable when committed out of necessity or for the purpose of achieving important objectives.

- **The "it's-no-big-deal" rationalization.**

This is a dismissive attitude that helps to minimize or excuse wrongdoing because of its alleged unimportance. Wrongdoers delude themselves into believing that their ethical lapses are not serious and, therefore, do not have consequences.

- **The entitlement rationalization**

Some people may deceive themselves into thinking their unethical actions are excusable or that they are entitled to break the rules.

- **The team-player rationalization**

This ethical trap is rooted in the fear that confronting superiors or colleagues about their transgressions will have repercussions on performance evaluation and career advancement.

How to become a good and ethical corporate citizen.

- **Tell the truth**

Avoid deceptive language, words with double meanings, and extremes of overstatement and understatement.

- **Avoid language that attempts to evade responsibility**

The passive voice, when misapplied, can mislead readers through its failure to assign responsibility for certain actions.

- **Don't suppress or de-emphasize important information**

Include any information the reader would want to have that is within your authority to disclose. Don't emphasize or de-emphasize certain facts to give readers a false impression; avoid half-truths and exaggerations.

- **Offer good value for money**

Back up any claims you make about the value of a service or performance of a product. There are stiff penalties for falsifying sales, marketing, and investment information and for making any claim about product pricing, performance, or quality that can't be verified.

- **Be timely in your communication**

Avoid unjustified delays in replying or processing information.

- **Avoid libel**

Libel is printed and recorded defamation and is characterized by false, malicious, or derogatory remarks - remarks that arouse hatred, contempt, or ridicule toward the individuals to whom they are applied.

- **Distinguish between fact and opinion**

Let readers know the difference between conjecture and a verifiable fact. Passing off an opinion as a fact is misleading and unethical.

- **Use a layout that doesn't hide information**

Style elements such as lists, bullets, and spacing should be used to spotlight important information, not hide it.

- **Known what you can and cannot disclose to certain parties according to corporate disclosure practices and confidentiality agreements.**

Careless publication or misuse of your company's intellectual property and confidential information, even in the form of an offhand remark.

- **Be especially careful communication in cyberspace.**

Cyberspace is an ethical minefield. Remember that e-mail and text messages are easily forwarded. Once they are sent, you have virtually no control over where they end up.

- **Don't claim authorship of documents you have not written.**

The consequences of *plagiarism* - not giving due credit for borrowed words or ideas - are serious.

Culture

The shared customs and patterns of behaviour of a particular group or society, including its language, rules, beliefs, and structures.

Ethnocentrism

The tendency to make false assumptions, based on limited experience, that one's own cultural or ethnic group is superior to other cultural or ethnic groups.

Low-context cultures

Cultures that favour direct communication and depend on explicit verbal and written messages exclusive of context.

High-context cultures

Cultures in which communication depends not only on the explicit working of a message but on its surrounding context.

Non-verbal behaviours

communication that takes place through gestures, facial expressions, eye contact, and posture.

Chapter 2: **PLANNING AND WRITING BUSINESS MESSAGES**

4 steps in the writing process:

- **Prewriting**
- **Organizing and Outlining**
- **Drafting**
- **Revising and Editing**

Planning and preparation are forms of risk prevention

Effective writing is: **Purpose-driven** (the reason of the paper), **Audience focused** (writing for the needs of the audience) **and Concise** (a message should be concise of only the words needed to present an idea clearly and courteously).

PREWRITING: The process of gathering ideas & establishing the purpose audience, and channel for a message

1. Purpose: To inform or persuade

2. Scope: The breadth or limitations of a document's coverage (length, format, visual elements and industry standard)

3. Audience Profile: Evaluating the audience's need according to organizational culture and cultural environment (do an audience analysis)

Audience Analysis: The process of assessing the needs and knowledge of readers and listeners and adapting messages accordingly.

Primary audience: The intended receiver of a message

Secondary audience: Anyone, other than the primary audience who will read a document

Reader Benefits: The advantages the receiver stands to gain by complying with what the writer proposes in buying products, following policies, or endorsing an idea

4. Medium or Channel: The physical means by which an oral or written message is transmitted.

Richness: A quality of the types of cues by which meaning can be derived from a message.

5. Content Generation: Collecting all the information you need before you start writing

1. **Brainstorming:** A method of generating content by listing ideas as they come to mind. (keywords)
2. **Mapping or Clustering:** A method of generating content by visualizing the main topic and its subcategories
3. **Journalistic Question:** The 5 W's (who what where when why)

ORGANIZING AND OUTLINING

4 Types of outline development:

Outline: Framework for a document, showing its division and elements

- Sequential method : In order of importance, steps
- Chronological method: From beginning to present
- The cause-and-effect method: Linking events to reasons
- The general to specific method

DRAFTING: The preliminary writing of a document

Writer's Block: A psychological state of being unable to compose a text due to a lack of inspiration.(Can strike at any time ..when you least expect it)

Freewriting: A method of generating content based on unstructured writing and the recording of ideas as they come to mind.

REVISING AND EDITING:

Revising: The process of reviewing and making changes in a draft document (adding , deleting, re-organizing and substituting) to transform the draft into a finished document.

Editing: The process of checking a writing draft to ensure it conforms to standards of good English, style and accepted business-writing practice.

- Work with a paper copy of your draft, read your draft aloud, reduce reading speed, look at the document from a reader's perspective.

Effective writing should follow these factors:

1. Accuracy
2. Conciseness
3. completeness

Collaborative writing: The process of writers working together to create finished reports, proposals, and other important documents

- Practice active listening, Designate a team coordinator, Do up-front planning, Split jobs, Use technology to overcome constraints of physical location. **HARMONIZE WRITING STYLE.**

Chapter 3: **WORD CHOICE, CONCISENESS, AND TONE**

Good style represents you + company

Plain style or plain language

a style of writing that places value on simplicity, directness, and clarity.

- **Use common, everyday words, except for necessary technical terms.**

Language should be familiar and accessible, not pretentious

- **Use reasonable sentence lengths.**
- **Use active-voice verbs and phrasal verbs.**
- **Use personal pronouns: I, YOU and WE**
- **Use unambiguous language.**
- **Place the subject as close as possible to the verb.**

Voice

a term that describes a verb's ability to show whether the subject of a sentence acts or is acted upon.

Phrasal verb

a verb that combines with one or more prepositions to deliver its meaning.

Pronouns

words that replace or refer to nouns

Ambiguity

a term that described an obscure or inexact meaning.

Use Familiar Words

Curb your use of Words Ending in -ize and -ization.

Verbs ending in -ize and nouns may sound rich and sophisticated, but they can also lead to an inflated, heavy-handed style that grinds comprehension to a frustrating halt.

Use words derived from French sparingly

Words the English language has borrowed from French can sound prestigious and distinctive when used sparingly, adding formality to your writing.

Avoid foreign words and phrases

Phrases such as *ad hoc* and *pro bono* are used in legal documents and formal writing.

Use only job-related Jargon.

a term that describes the specialized terminology of a technical field or outdated, unnecessary words used in a business context.

Bypass buzzwords.

fashionable, technical, or computer jargon

Use language that is fresh and current

1. **Replace Cliches**
2. **Retire outdated business expressions**
3. **Eliminate slang**
4. **Avoid IM abbreviations and emoticons.**

Keep language specific, precise, and functional

1. **Provide specific details that help readers act on information and requests.**

Concrete nouns are easier to grasp than abstract nouns.

2. **Quantify facts and avoid vague qualitative statements.**
3. **Avoid ambiguous and non-idiomatic expressions.**
4. **Use comparisons and analogies to clarify.**
5. **Be timely and accurate in your communication.**
6. **Avoid untrue, deceptive, or misleading statements.**
7. **Know what you can and cannot disclose to certain parties.**
8. **Distinguish between fact and opinion**
9. **Don't claim authorship of documents you have not written.**

Achieving Conciseness

1. **Eliminate long lead-ins.**
2. **Revise noun conversions**
3. **Eliminate redundancies**
4. **Eliminate or revise empty words and phrases**
5. **Use strong, precise, accurate verbs**
6. **Revise prepositional phrases**
7. **Eliminate fillers**
8. **Shorten multiple *that/which/who* clauses**
9. **Combine shorter sentences, reduce clauses and phrases.**

Active voice

a writing style in which the grammatical subject of a sentence performs the action

Passive voice

a writing style in which the grammatical subject of a sentence is acted upon

Prepositional Phrase

a phrase beginning with a preposition and functioning as a modifier

Expletive construction

a phrase such as *there is/are* or *is/was* at the beginning of a clause, delaying the introduction of the subject

Tone

Tone

The implied attitude of the author to the reader, as reflected by word choice

Denotation

a word's literal or dictionary definition

Connotation

a word's implied or associative meaning, often coloured by emotion

Formality

the level of writing; whether the writer is using the appropriate register based on an observance of the rules and conventions of writing.

Personal Style

a style of writing that seems warm and friendly based on its use of first- and second- person pronouns.

Impersonal style

a style of writing that seems objective and detached based on its use of third- person pronouns.

BE POSITIVE

Reader benefit

the benefits or advantages a reader can gain by complying with the action the writer endorses.

You-attitude

a writing style that focuses on the reader rather than on the writer

We-attitude

a writing style that focuses on the shared goals and values of the writer and reader(s).

BE POLITE

Salutation

a greeting at the beginning of a letter: "dear Ms. Gill"

Use inclusive language

1. Don't make discriminatory comments

NO - Please contact Piotr, who has a nice Polish accent but speaks English very well

YES - Hassan will be available to answer your questions

2. Use only gender-neutral job titles and salutations

3. Use Masculine Pronouns reasonably

Write with confidence

1. Use definite, forward-looking language
 2. Don't make unnecessary apologies.
 3. Use strong, assertive phrasing rather than "weasel words."
 4. Be knowledgeable and informative
 5. Guard against overconfidence
-

Chapter 4: SENTENCES AND PARAGRAPHS

Phrase: A group of words containing either a subject or verb, which cannot stand on its own.

- A phrase punctuated like a complete sentence is a sentence fragment

Clause: A group of related words containing a subject and a complete verb; when it delivers full meaning its called an *independent clause*; when it doesn't deliver full meaning by itself it is called a *dependent*

clause.

Independent Clause: A clause containing a subject and complete verb that functions on its own.

Dependent Clause (subordinate clause): A clause that cannot function on its own.

Subject: The word or group of words in a sentence that acts or is acted upon.

Verb: The word or group of words in a sentence that describes an action, occurrence, or state of being.

TYPES OF SENTENCES:

Simple Sentence: A sentence containing one main or independent clause. (Straightforward and emphatic).

Compound Sentence: A sentence containing two or more independent clauses joined by one or more coordinating conjunctions.

- Coordinating conjunctions: *as for, and, nor, but, or, yet, so*

Complex Sentence and Compound-Complex Sentence: A sentence containing one independent clause and one or more dependent clauses.

IMPROVING SENTENCE VARIETY AND LENGHT

1. Vary the rhythm by alternating short and long sentences
2. Turn a clause into a prepositional phrase

Prepositional Phrase: A phrase beginning with a preposition that sets out a relationship in time or space.

- Prepositional words: *with, at, to of, by, against, toward, from, above, on, in*

3. Convert a sentence defining or describing something into a phrase or clause.(2 sentences into one)

Appositive: A word or group of words that renames a preceding noun. (i.e: Frederika smith, a financial consultant, ...)

PHRASING BASIC TYPES OF Q'S

Declarative Sentences: A statement that makes a statement. (It is cold outside today)

Closed Question: A question with a limited number of possible responses (Yes, No , Maybe, IDK)

Open Question: A question with an unlimited number of possible responses (short/long answers)

Hypothetical Question: A question that poses a supposition (what if Q's)

IMPROVING SENTENCE CLARITY

1. Avoid broad reference using *this*, *that* and *it*.

- **Pronoun reference:** The relationship between a pronoun and the antecedent to which it refers (be carefully to ambiguity)

2. Avoid embedding dependent clauses. Put dependent clauses at the beginning or at the end to have more impact.

3. Limit multiple negative. (Multiple negatives are often used for rhetorical effect or as euphemisms, but it results in CONFUSION).

WRITING WITH CONSISTENCY By sticking to certain grammatical principles and patterns that shape your writing (**good for banishing awkward, unreadable sentences**).

1. Number: A term that refers to whether something is singular(one) or plural (+1)

2. Person: A term that describes who or what is performing or experiencing an action in terms of the noun and pronoun that is used. 1st person (I,we) 2nd person (you), 3rd person (he, she, it, they)

3. Verb Tense: The form of a verb that shows time (past, present, future)

4. Voice: Active VS Passive (Stick to one)

WRITING BALANCED SENTENCES (Parallel Structure)

Parallelism: The use of the same grammatical forms or matching sentence structures to express equivalent ideas.

- Matching nouns with nouns, verbs with verbs, and phrases with phrases (Have rhythmic appeal that makes sentences more forceful and compelling) Good for readability also :)

WRITING FOR EMPHASIS

Emphasis: In writing, the practice of making facts and ideas stand out from surrounding text.

underlining, **boldface**, *italics*, Modified Font size, ALL CAPS, text boxes and colour,

*** do not overuse as it can be distracting ***

- Use dashes- the most emphatic of all punctuation marks - in place of commas and parentheses to increase emphasis.

Shouting: The largely unacceptable practice of typing a message in block letters (all caps)

ADD EMPHASIS:

1. Put facts at first or at last for maximum impact
2. Use short, simple sentences to spotlight key ideas
3. Use tags and labels to flag important ideas
4. Present important information in list form
5. Use precise and specific words to identify the main points
6. Repeat keywords in a series for rhetorical effect

WRITING FOR DE-EMPHASIZING (Usually used to deliver bad news)

1. Use complex sentences to de-emphasize bad news
 - The independent clauses emphasize while the subordinate clauses de-emphasize. (bad news in the opening subordinate (dependent clause))
2. De-emphasize unpleasant facts by embedding them. (unfavourable information seems less harsh and less noticeable when buried mid-sentence or mid-paragraph)

APPLYING ACTIVE AND PASSIVE VOICE

The voice of a verb tells you whether a sentence's subject acts (active voice) or receives an action (passive voice).

Active Voice: Energetic, forceful and direct. Use it to:

Actor -> Action -> Receiver

1. To state good and neutral news clearly and directly

2. To emphasize the doer of an action

Passive Voice: Less vigorous and forthright. To some readers it sounds flat, weak, and evasive.

Receiver -> Action -> Actor

The term *institutional passive* refers to the practice of concealing the performer of an action (by omitting the word or words after).

1. To conceal the doer of an action when that information is unimportant, unknown, or harmful.

The passive voice does not assign responsibility for an action

2. To de-emphasize negative news

The passive voice depersonalizes sentences by taking people and personalities, as expressed through names and personal pronouns, out of the picture.

3. To show tact and sensitivity (Politeness strategies)

Allows you to pass on information without allocating blame, finding fault, or making readers feel needlessly singled out.

4.To reduce intrusive first-person pronouns

The passive voice is appropriate when it is already clear from the context that you are responsible for an action

5. To maintain consistency or avoid awkward shifts in focus

Stick to the passive voice if a shift in the active voice creates awkwardness.

ELIMINATING GRAMMAR ERRORS AND AWKWARDNESS

Sentence errors detract from the professionalism of your messages and reduces readers' confidence in what you have to say.

1. Sentence Fragment: Those incomplete portions of sentences

2.Run-on (fused) Sentences: Run-ons or fused sentences are two or more independent clauses that are combined without an adequate full stop (semicolon or period) or connecting element(comma or conjunction)

3.Comma Splices: Independent clauses are strung together with nothing more than a comma to separate them.

4.Misplaced Modifiers: A word or word group that describes another word or words.(to eliminate them position modifiers as close as possible to the word or words they describe

5.Dangling Modifiers:When a word does not clearly apply to another word in the sentence. (convert to a dependent clause)

6.Elliptical Construction: (*Ellipsis* means 'omission'). An elliptical construction leaves out words that have already appeared in a sentence because their meaning is inferred from the context

7. Faulty Prediction and Mixed Construction: Those sentences pair mismatched elements that do not logically fit together and must be untangled in order to make sense.

PARAGRAPH LENGTH

Paragraph: A group of sentences that develops one main idea. (the shorter it is the more impact it has, due to its consistency)

- Single-sentence paragraphs: (**or paragraphs up to 2 sentences**) Common message openers and closers. Brief and serviceable, they are also useful for lending emphasis to especially important facts or ideas and have a special place in e-mail.

- Short paragraphs: 5-6 sentences (up to 8 lines). They are standard in most type of business messages.
-
- Long paragraphs: Paragraph of up to 8 sentences usually found in reports. Complex sentences and thorough the subject. Any paragraph of above 8 sentences should be regrouped into smaller more smaller, more manageable units.

TOPIC SENTENCES

Topic Sentence: A sentence that summarizes the main idea (purpose) of a paragraph. *Never put negative info in a topic sentence*

- Should be used in paragraph that define, describe, classify, or illustrate.
- In paragraph of comparison or persuasion, the topic sentence is delayed or embedded .

This sentence helps maintain the focus of the writing. Clear picture of what is going to be looked at .

PARAGRAPH DEVELOPMENT

The form of a paragraph depends on how you develop the main idea being introduced:

- describe a chronological sequence of events
- compare & contrast one idea with another
- evaluate causes & effect
- analyze a topic /give solution to problem
- classify parts as a whole
- illustrate an idea/ support a claim with examples&data
- define terms

Identifying your subject and purpose are the 1st steps in writing a clear, effective paragraph. Many require supporting sentences to explain and amplify.

PARAGRAPH COHERENCE

Coherence: The logical and semantic links between sentences.

- The flow of ideas (focus on linking and bridging techniques that enable you to guide your readers through a paragraph from beginning to end.

1.Creating Logical Coherence: Know your line of reasoning and order your ideas accordingly.

2.Creating Coherence through Word Choice:

1. **Carry over a topic from sentence to sentence:** To prevent redundancy, use synonyms to stand in for the sentence subject or put a phrase or clause in front of the sentence subject to reduce its impact.
2. **Use pronouns to carry over a thought from a previous sentence:** For clarity, combine *this*,

that, these and *those* with the single word to which each refers.

3. Use transitional words and phrases to segue from sentence to sentence:

Transitional Expressions: Words or phrases that show logical, temporal, and spatial relationships and connect ideas to create coherence.

- To add a point→ also, and, as well
- To illustrate→ for example, for instance, in fact
- To show cause & effect→ as a result, because, since
- To show contrast or reversal→on the other hand, however, although
- To show similarity→ likewise, similarly
- To summarize or conclude→ in short, to conclude
- To concede a point→ of course, certainly
- To show time sequence→1st, 2nd, 3rd, last, finally, now, meanwhile

PROOFREADING

Proofreading: A process of checking the final copy of a document for errors and inconsistencies.

Format: A term for the parts of the document and the way they are arranged on a page

Reduce reading speed. reading word for word, reading out loud .**Checking for:**

1. Accuracy of names, facts and figures
 2. Appropriateness of format: (check page layout)
 3. Correction of grammar
 4. Spelling (Spell Check software are good, but not near perfect)
 5. Punctuations (follow the basic rules of comma usage)
-

Chapter 5: **MEMORANDUMS, E-MAIL, AND ROUTINE MESSAGES**

Memorandums

Memos

A specially formatted document that is sent to readers within an organization

E-mail

Messages distributed by a computerized mail service

Header

A block of text appearing at the top of a document

Headings

Visual markers consisting of words or short phrases that indicate the parts of a document and signpost its organization

Boldface

A thick, black typeface used for emphasis

Bullets

Visual cues, usually large round dots or squares, that set off items in a vertical list or emphasize lines.

Memo Format**Subject Line**

indicates the title, topic, or purpose

List

a group of three or more logically related items presented consecutively to form a record or aid to memory.

Chunking

The grouping of items of information together to be remembered as a unit.

Email**Netiquette**

The informal code of conduct governing polite, efficient, and effective use of the Internet.

General E-mail guidelines

- 1. Keep it brief**
- 2. Remember that E-mail is not your only option**
- 3. Compose crucial messages offline.**
- 4. Follow organizational rules for e-mail**
- 5. Don't use company e-mail systems for personal communication**
- 6. Aim for a balance of speed and accuracy**
- 7. Avoid emoticons.**
- 8. Understand that e-mail is not guaranteed to be private.**
- 9. Don't "write angry". Avoid flaming**
- 10. Don't send unnecessary messages.**
- 11. Protect yourself and your company**

Spam

An advertising message - electronic junk mail - sent widely and indiscriminately

Flaming

The act of sending out an angry e-mail message in haste without considering the implications of airing such emotions.

Reading and processing incoming messages

1. **Schedule time for reading and writing e-mail.**
2. **Do regular inbox clean-ups.**
3. **Scan the entire list of new messages in your inbox.**
4. **Use filtering options and anti-spam software.**
5. **Capture your e-mail in a recognizable records system.**

Formatting and writing e-mail

1. **Type the e-mail address correctly**
2. **Compose an action-specific subject line**
3. **Wrap text after 70 characters**
4. **Use a regular mix of upper- and lowercase letters**
5. **Keep paragraphs and sentences short.**

As you begin to compose your message, keep in mind the following strategies for shaping its content:

1. **Use appropriate greetings to soften the messages.**
2. **Get to the point immediately.**
3. **Use lists without overloading them**
4. **Sign off with a complimentary close and your name**
5. **Tell people who you are.**
6. **Edit your text and run a spell-check**
7. **Follow common sense rules for attachments**

Distribution List

A group of e-mail recipients addressed a single recipient, allowing the sender to e-mail many users without entering their individual addresses.

Shouting

The practice - often considered rude - typing e-mail messages in upper-case LETTERS

Salutation

The greeting in a letter, used to address the person being written to.

Complimentary close

a formulaic closing, usually a word found after the body of a letter and before the signature

Attachment

An independent computer file sent with a regular e-mail message.

Replying to E-mail

1. **Reply as promptly as possible.**
2. **Modify your distribution list.**
3. **Don't automatically include the sender's original message with your reply.**
4. **Avoid indiscriminately forwarding e-mails.**
5. **Don't be impatient for a reply.**
6. **Make provision for your absences from the office.**
7. **Protect and respect authorship.**

Informative Memo

a message to which the reader will react neutrally.

Request Memo

a message that asks the reader to perform a routine action.

Response

a message that answers a request or query.

Goodwill message

a message that enhances the value of a business beyond its tangible assets by creating a bond of friendship and establishing trust and mutual understanding between the writer and recipient.

Follow-up message

provides a record of a meeting - its time, place, purpose, and any agreements that may have been made.

Instant Messaging (IM)

The exchange of messages over the Internet between two or more users who are online simultaneously.

INSTANT MESSAGING (IM)

1. **Limit the use of abbreviations.**
 2. **Use a natural mix of upper- and lowercase.**
 3. **Keep conversations to a few people at a time.**
 4. **Set status flags to "away" or "busy" if you don't wish to be engaged.**
-

Chapter 6: **ROUTINE AND GOODWILL MESSAGES**

DIRECT WRITING PLAN

Good news messages, which inspire positive reaction from readers, establish rapport all on their own.

- Together good news and informative messages are the mainstays of business correspondence

Direct-Approach message: A message that presents the main point in the 1st paragraph

- Direct approach saves time and carry impact (North Americans (low context countries) appreciate it. STRAIGHTFORWARD.

In high context cultures like China, Japan and Arab countries directness is considered rude and may actually prevent your message from getting across.

When you are communicating cross-culturally, weigh your readers' tolerance for directness.

3 Step writing plan for direc-approach messages:

1. **Opening:** Deliver the main message first. State the good news, make a direct, specific request.
2. **Middle:** Explain the details of the news/inquiries
3. **Closing:** End pleasantly by asking for action, asking a response, the next step, communicating goodwill, show appreciation

REQUEST

The 1st step in getting something you need is KNOWING HOW TO ASK FOR IT.

- **Put the main idea first** (phrase a request as a question or a polite command)
- **Give a reason for the request or state its benefit in the second paragraph**
- **Introduce multiple requests or questions with a summary statement**
- **Anticipate details**
- **Strike a tone that is right for your reader** (firm, but respectful. Show courtesy, especially in an externally directed message)
- **Keep minor points to a minimum** (unnecessary information blunts the impact of your requests)
- **Use a layout that focuses attention on your request** (bulleted list, italics, bold..)
- **Close in a courteous and efficient way** (Focus on the action you want your reader to take and use positive language to communicate goodwill and show appreciation)

Asking for information, credit, and action:

An effective request for information or action lets the reader know at the beginning exactly what is required, what should be done, or what compliance you seek.

Order request:

A request for merchandise that includes a purchase authorization and shipping instructions.

1. Authorize the purchase and specify the preferred method of shipment
2. Itemize requested merchandise, using list format
3. Close with special instructions and thanks

Claim Letters:

Claim: A demand or request for something, often a replacement or a refund - that is considered one's due.

- Your best chance for success lies in staying objective and stating clearly what you expect the company to do

1. Make your request for an adjustment: State what you expect to be done to solve the problem.

Adjustment: A written response to a complaint that tells the customer what will be done about the

complaint in terms of solving the problem, correcting an error, granting a refund, or adjusting the amount due.

2. Identify the faulty item or problem and explain logically and specifically why your claim is justified: State the important info in order to solve the problem. Place of purchase, date of purchase, part names, model number, copy of the bill

* use objective unemotional language to motivate the reader by showing how reasonable you are *

3. End positively and pleasantly: Restate the action you have requested and expressing confidence in the settlement of your claim.

* Keep a copy of your letter in a file with other documents related to your claim*

RESPONSES

Response: A message that answers a request or query.

A routine response provides focused details of a decision, answer, or action so readers can make informed decision, follow through, or know what happens next.

- Determine if you are the right person to handle the response. *If you do to have the authority to process a request, refer it to someone who does*
- Reply as soon as you possibly can. *A prompt response shows that you have taken the case very seriously*
- Begin with good news or the most important piece of information.
- Design your response to be useful. *Anticipate information your reader may need*
- Respond within your company's ethical guidelines.
- Make your closin work for you. ** Avoid clichés and expressions that are mainstream* ... Be original.*

Information Response

A response to an inquiry should supply requested information first without the need for an introduction

** It is necessary to confirm the receipt of a request - or to begin by thanking the reader fro having written or having made an **inquiry***

Inquiry: A message that asks for or seeks information

When replying to multiple requests, answer questions in the order they were asked and use headings, bulleted/ numbered lists, or other graphic highlighting techniques to arrange information logically for maximum readability.

Personalized form letters: A letter in which the identical message is sent to more than one person; its adapted to the individual reader with the inclusion of the reader's name, address, and perhaps other infos, all of which may be stored in a database and merged with the form letter.

A well written form letter provides a way to save time & money while sender order acknowledgements, requesting action from customers and suppliers, and supply answers to FAQs

Order acknowledgement: An informative letter that confirms the details of a merchandise purchase and shipment.

- An effective order of acknowledgement answers this need with a message that is upbeat, efficient, and as concise as possible.

1. Acknowledge when and how a shipment will be sent
2. Give details of the shipment and convince readers they have made a wise purchase
3. Use discretion in pushing additional products
4. Close pleasantly

Messages confirming contracts and arrangements:

- The terms of an agreement
- An action or transaction that has taken place, including receipt of an invitation, résumé and report
- A decision
- Arrangements for a future event

The goal of a confirmation message is to confirm and explain details already established in a related document or to put an oral agreement into writing (it avoids confusion between the parties)

Confirmation of an arrangement , including time-specific events such as travel, meetings, conferences and appointments, keeps planners and participants onside so that they can properly coordinate their activities and ensure that those activities have the outcome they intend.

Claims adjustment: *A response to a claim letter telling the customer what your company intends to do correct the problem.*

Claimants typically want to learn the good news about a refund, replacement, or other compensation at the beginning of your message.

GOODWILL MESSAGES

Goodwill Message: A message that enhances the value of a business beyond its tangible assets by creating a bond of friendship and establishing trust and mutual understanding between the writer and recipient.

*PERSONAL , SHORT , SINCERE AND SPONTANEOUS *

THANK- YOU LETTERS

Thank-You Letter (letter of appreciation): A message thanking someone for helping you, extending hospitality to you, or doing business with your company.

Needs to be honest and meaningful

LETTER OF CONGRATULATIONS

A message conveying pleasure at someone's happiness or good wishes on someone's accomplishment

LETTER OF SYMPATHY

Condolence: A message expressing sadness at someone's bereavement and offering words of comfort (It should be handwritten and sent ASAP)

INFORMATIVE LETTERS

Informative letters: Message that provide important/relevant information to which the reader will react neutrally.

Announcement: A message that makes something known about a company policy, event or personnel change.

When the news you have to deliver is positive or neutral, use the direct approach

If there are negatives, make them clear but try to present them as positively as possible

COVER OR TRANSMITTAL LETTERS

A Cover or Transmittal Letter: An informative letter that accompanies materials sent from one person to another explaining why those materials are being sent. (*A report, proposal, or shipment of materials*).

INSTRUCTIONAL LETTER/MEMO

- Instructions systematically explain a process, activity, or operation and make it doable for the average reader.

LETTER FORMATS

The appearance of a document is a reflection of the professional standards of the writer and the organization to which the person belongs

LETTER BALANCE AND PLACEMENT

Ragged or unjustified, right margins: Unjustified margins that end unevenly on the right side of the page.

LETTER STYLES AND LAYOUT

The formats or styles for business styles for business letters are *full block*, *modified block* and *simplified*.

LETTER ELEMENTS

Heading/return address

Dateline

Inside address

Salutation

Message

Complimentary close

Signature block

Letterhead/ Return Address: A printed heading on company stationery, containing the address of an organization or individual, but not the individual's name

Dateline: Identifies the date on which a message was written

Delivery/ Confidential Notation: An optional letter element identifying how a message is transmitted and who is authorized to open and read it.

Inside Address: A standard letter element supplying the name and full address of the recipients

Attention Line: An optional letter element identifying the individual, officer, or department to whom or which the letter should be directed

Reference Line: An optional letter element identifying a file or policy number

Salutation: A letter greeting identifying the individual for whom the letter is intended, including the recipient's personal title and surname

Subject Line: An optional letter element that identifies the content or focus of a message

Message Body: Starts 2 lines after the salutation

Complimentary Close: The word of formal closing after the body of the letter and before the signature

Signature Block: Includes the writer's name, title, and organization in a neatly formatted arrangement

Identification Initials: Capitalized initials, followed by a colon, indicate who wrote the letter; lower-case initials indicate who keyed it.

Enclosure Notation: indicated enclosed or attached material- a brochure, invoice, article, etc...

Copy Notation: indicates that copies of the letter have been sent to individuals other than the addressee.

Continuation Page Heading: Identifies the second and succeeding page of a letter with a heading that

includes the name of the addressee, date, and page #.

Chapter 7: **DELIVERING UNFAVOURABLE NEWS**

Negative message

a message that communicates negative information that may upset or disappoint the reader.

Tone in Bad News Messages

- Don't plead with the reader
- Beware of mixed messages
- Avoid statements based on assumptions that the reader will accept the bad news
- Stick to facts and keep your language jargon-free
- Avoid statements of opinion that can expose you and your company to legal liability
- Edit timid or overly apologetic statements that may weaken the reader's confidence in your decision.
- Avoid unnecessarily writer-centred remarks
- Use expressions of sympathy

Subject lines and complimentary closes

- **Positive subject lines**
 - highlight solutions in problem-oriented messages and persuade readers of the benefits of potentially unpopular policies or changes.
- **Neutral subject lines**
 - signal the topic but without referring to the bad news.
- **Negative subject lines**

- are uncommon but can be used to command attention for serious internal problems and issues that might otherwise be ignored.

Organizing Bad News Messages

- how well you know the reader,
- what position the reader holds relative to you in the company hierarchy,
- how much information you can safely disclose to the reader,
- how prepared the reader is for the bad news,
- how much resistance you anticipate,
- how adversely the refusal or denial will affect the reader, and
- what readers, especially of internal messages, are accustomed to.

Direct Writing Plan for Bad News Messages Using the direct writing plan

- 1. Begin with a simple, well-phrased statement of the bad news.**
- 2. Provide an explanation for it - that the reader can reasonably accept.**
- 3. Offer an alternative if it is possible to do so.**
- 4. Close with a goodwill statement that doesn't refer to the bad news.**

Indirect Writing Plan for Bad News Messages Using the indirect approach

- 1. Begin with a buffer**
- 2. Provide a solid, reasonable explanation**
- 3. State the bad news**
- 4. Close with a goodwill statement**

Indirect Writing Plan

a method of organizing a document so that the main message is delayed and presented toward the end.

Buffer

a meaningful, neutral statement that cushions the shock of bad news.

Explaining the bad news

- 1. Stick to the facts and avoid editorializing.**
- 2. Refer to company policy as needed but don't hide behind it.**
- 3. Use positive or neutral words.**

Revealing the Bad News

- 1. Put the bad news in a dependent clause.**

2. **Suggest a compromise or alternative.**
3. **Use the passive voice.**
4. **Use long sentences rather than short ones.**
5. **Use positive language.**
6. **Avoid spotlighting the bad news.**
7. **Imply the refusal.**

Goodwill Closing

1. **Don't repeat the bad news, remind the reader of past problems, or hint at future difficulty.**
2. **Do offer your good wishes to the reader.**
3. **Don't invite further correspondence unless you sincerely want contact.**
4. **Don't apologize for having to say no, especially at the end of your message.**
5. **Don't take credit for helping the reader unless you have actually provided assistance.**

Goodwill closing

draws attention away from the message to a positive and continuing relationship with the reader.

Apologies in Bad News Messages

- **Don't apologize for minor errors**
- **Do apologize for any serious trouble**

Types of Bad News Messages

Refusing Requests for Information, Actions, and Favours

1. **Buffer the opening.**
2. **Give reason(s) for the refusal.**
3. **Soften or subordinate the bad news.**
4. **Offer an alternative or compromise if a good one is available.**
5. **Renew goodwill in closing.**

Refusing Claims

1. **Begin with a statement of appreciation, common ground, or understanding.**
2. **Provide a concise, factual explanation.**
3. **Don't apologize for saying no.**
4. **End in a friendly, confident, conciliatory way.**

Refusing Credit

1. **Buffer the opening.**

2. **Use discretion in explaining the reason for the refusal.**
3. **Soften the refusal with a passive-voice construction.**
4. **Offer incentives to sustain business.**

Turning Down Job Applicants

1. **Open by cushioning the refusal.**
2. **Give reasons for the company's selection, if it is possible to do so.**
3. **Quickly move on to the bad news.**
4. **Gently encourage the applicant.**

Announcing Bad News to Employees

Before you write, you should have firm answers to the following questions:

- **Why has the decision forcing the announcement of bad news been made?**
- **What is the purpose of the change?**
- **How does the bad news affect employees?**

Declining Invitations

1. **Express appreciation for the invitation or pay the reader a compliment.**
 2. **Express your regret at not being able to attend and, if appropriate, explain why you are unavailable.**
 3. **Propose a constructive alternative if one is available.**
 4. **End by renewing goodwill.**
-

Chapter 8: PERSUASIVE MESSAGES

Persuasion

the process of gradually influencing attitudes and behaviours and motivating the audience to act.

Maslow's hierarchy of needs

a specific order of needs identified by Abraham Maslow- physical needs, the need for safety, social needs, the need for self-esteem, and the need for self-actualization- all of which motivate humans.

Appeal

an attempt to persuade

Logical fallacy

an error in logic that weakens a persuasive argument- for example, a personal attack a mistaken assumption that one event causes another, or reliance on testimony of someone who isn't an expert.

Persuasive Appeals

- Appeal to Reason:
- Appeal to Emotion:
- Appeal to Ethics:
 1. Specialized knowledge.
 2. Reputation.
 3. Authority.
 4. Familiarity.

Indirect Writing Plan for Persuasive Messages

1. **Obtain Interest.**
2. **Prove your proposal or product can benefit the reader.**
3. **Minimize resistance.**
4. **Ask for a specific action.**

Claim Requests

1. **Gain positive attention.**
2. **Prove your claim is valid.**
3. **Ask for a specific action.**

Collection Letters

- **Stage One- Reminder**
- **Stage Two- Inquiry**
- **Sympathy**
- **Self-interest**
- **Stage Three- Demand**

Collection Letters

A series of increasingly persuasive appeals to a customer asking for a payment for goods and services already received.

Reminder Letter

informs a customer in a friendly way that a payment has not been received and emphasizes the customer's good credit rating until now.

Inquiry Letter

Attempts to determine the circumstances that are preventing payment and asks for payment.

Sales Letter

a letter that promotes a product, service, or business and seeks prospective customers or additional sales.

Aiming to Make a Sale: Analyzing the Product and Audience

1. **Study the product or service.**
2. **Learn as much as possible about the target audience.**
3. **Aim for an ethical sales pitch.**
4. **Consider other factors.**

Writing Plan for Sales Letters

1. **Gain attention.**
2. **Introduce the product.**
3. **Make the product desirable.**
4. **Ask for action and make responding simple.**

Step 1: Gain Attention

- **A thought-provoking fact or statement:**
- **Good news that makes the reader feel important or unique:**
- **A special offer or bargain:**
- **A product feature:**
- **A question:**
- **A story:**

Step 2: Introduce the Product

Step 3: Make the Product Desirable

- **Mention it only after you have created a desire for the product**
- **Break the price down into smaller units**
- **Make the product a bargain by calculating the cost after discount or rebate**
- **Show savings over a competitor's product or, for subscriptions, over the per-unit purchase price.**
- **Link the price with benefits.**

Step 4: Ask for a Simple Action

Fundraising Messages

1. **Identify an important problem.**
 2. **Show that the problem is solvable.**
 3. **Explain what your organization is doing to solve the problem.**
-

Chapter 9: COMMUNICATING FOR EMPLOYMENT

Job-Hunting

1. **Read the career pages, classified ads, and financial sections** of newspapers, trade and professional journals, and business magazines.
2. **Master electronic job-search techniques.**
3. **Learn to network.**
4. **Tap into the hidden job market.**
5. **Visit employment agencies.**
6. **Think ahead.**
7. **Polish your interpersonal and communication skills.**

Job-prospecting letter

An unsolicited letter in which a job-seeker introduces himself and asks about job openings.

Cold call

An unsolicited telephone call in which a job-seeker introduces himself and asks about job openings.

Employment agency

An organization that matches job candidates with jobs, sometime for a fee.

Resume

A persuasive written document in which a job applicant summarizes her qualifications and relates her education, work experience, and personal accomplishments to the needs of a prospective employer.

Writing style

- **Use capitals and/or boldface for headings.**
- **Use consistent indenting.**
- **Leave space between sections.**
- **Proofread to catch errors.**

Education

- **The degree, diploma, or certificate;**
- **Academic honours you graduated with;**
- **The name of the institution that granted the degree;**
- **The location of the school;**
- **You major field of study, concentration, or specialization; and**
- **Dates of attendance and/or date of graduation.**

Work Experience

- **Job titles**
- **The company and its location**
- **Dates of employment**
- **Significant duties, activities, achievement, and promotions**

Chronological Resume

A document in which a job applicant's work experience, education, and personal achievements are presented in reverse time sequence, with the most recent experience in each category listed first.

Functional Resume

A document in which a job applicant's qualifications are presented in terms of notable achievements and abilities than work experience.

Combination Resume

A document that combines characteristics of chronological and functional resumes.

General Tips

1. **Tell the truth.**
2. **Keep your resume up to date.**
3. **Create different versions of your resume.**
4. **Fine-tune your resume for each new application.**
5. **Avoid gimmicks.**

Scannable Resume

A paper or electronic resume that is prepared for scanning through uncluttered formatting and inclusion of a keywords section.

Preparing an E-mail Resume

1. **Read instructions for job ads carefully.**
2. **Attach a resume or cover letter to your e-mail only when specifically requested.**
3. **Use keywords.**
4. **Include a cover letter.**
5. **Put the job title and/or reference number in the subject line of your message.**
6. **Use formatting methods that make your resume more computer-friendly.**

DONT

- **Use special character**
- **Use a word-wrap feature**
- **Use bullets, italics, underlines texts, graphics, slashes.**
- **Use non-proportional typefaces such as Times New Roman, USE COURRIER.**

Cover letter

A letter that accompanies a resume to summarize a job applicant's qualifications and value to a prospective employer.

Preparing a Persuasive Application Letter

1. **Camouflage I, *me*, and *mine*.**
2. **Get the company name right.**
3. **Use keywords from the job ad or posting.**
4. **Use the same font that you used for your resume.**
5. **Avoid dense, overloaded paragraphs.**
6. **Don't please, apologize, or exaggerate.**
7. **Avoid a cookie-cutter approach.**
8. **Strive for a tight, clear writing style.**
9. **Keep a copy of your letter.**

Solicited Application Letters

1. **Introductory paragraphs: Gain attention.**
2. **Middle paragraphs: Show that you are qualified by relating your skills to what the company requires.**
3. **Closing paragraph: Ask for action**

Unsolicited application letter

An employment letter written when the applicant does not know that a company is hiring.

E-mail Cover Letters

- **Include a specific and meaningful subject line.**

- **Keep it short and succinct.**
- **Limit yourself to the character on a standard keyboard**

Job Application Round Up - Some Additional Tips

1. **Keep track of the companies to which you have applied.**
2. **Ensure future contacts remain professional.**
3. **Consider privacy and confidentiality.**
4. **Ensure your application is delivered on time, in the appropriate way.**

Job Interviews Before the Interview

1. **Prepare in order to minimize job interview anxiety.**
2. **Become familiar with you non-verbal communication habits.**
3. **Dress for the job.**
4. **Anticipate what questions you might be asked.**
5. **Be prepared to talk about your experiences and how you handled problems.**
6. **Prepare several good question to ask the interviewer.**
7. **Practice**

At the Interview

1. **Arrive on time or a little early.**
2. **Go alone.**
3. **Bring an extra copy of your resume and a reference list.**
4. **Mind your manners.**
5. **Make a poised and confident first impression.**
6. **Listen carefully to the interviewer's questions - and don't interrupt.**
7. **Use correct English.**
8. **Concentrate.**
9. **Avoid being negative.**
10. **Make intelligent use of your research on the company.**
11. **Don't obsess over salary or benefits.**
12. **Don't expect an immediate response.**

After the Interview

1. **Follow up with a letter.**
2. **Consider your options carefully**

Job Interview

A structure, face-to-face conversation between one or more recruiters and a job candidate, in which the

job candidate's qualifications for a position and potential performance are assessed.

Follow-Up Employment Messages

Follow-Up Letter

An informative letter that summarizes the key points of a job interview.

Chapter 10: **INFORMAL REPORTS**

Business Report

a document in which factual information is compiled and organized for a specific purpose and audience.

Content

- **Writing with your aims, objectives, and main message in mind.**
- **Weigh information according to what is going to be done with the report and what its future use will be.**
- **Include information the reader needs for action-taking and decision-making by extracting pertinent facts from reams of raw data and analyzing/interpreting those facts so that they make sense to readers and relate clearly to the problem you are solving, the question you are answering, and the conclusions that you draw.**

Clarity

- **Apply principles of good English- write in simple, straightforward, tightly constructed sentences with correct grammar, punctuation, and spelling.**
- **Guide the reader through your discussion- use overviews to forecast what you will discuss, use transitions to show how your discussion is continuing or changing, add headings of various levels to help readers find information, and use topic sentences to announce what each paragraph is about.**
- **Use text citations selectively; give formal credit to the sources you use or quote.**
- **Include visual elements that are explanatory, show the significance of your facts, match your objectives, and help the reader make an informed decision; introduce and label each visual you use.**
- **Ensure facts are introduced in the right place by editing your draft and deleting extraneous material.**

- **Use consistent evaluation criteria when you weigh options and draw conclusions.**

Skimmability

- **Select a readable font to reduce eye strain and lessen reading time.**
- **Use informative headings and lists to group similar data together, signpost significant facts, emphasize the main ideas, and show where your analysis is leading.**
- **Use white or neutral space effectively.**

Informal vs. Formal Reports

Informal Report

a report using a letter or memo format, usually ranging from a few paragraphs to ten pages in length.

Formal Report

a business document of ten or more pages based on extensive research and following a prescribed format or pattern that includes elements such as title page, transmittal or cover letter, table of contents and abstract.

Distinguishing Features of Short Reports

Purpose

- **Information**
- **Information and analysis**
- **Information, analysis, and recommendations**
- **Informational reports**
- **Analytical and recommendation reports.**

Information Report

a short report that collects data related to a routine activity without offering analysis or recommending action; it is organized in three parts: introduction, findings, and summary/conclusion.

Analytical report

a report that interprets and analyzes information and offers recommendations based on findings.

Periodic report

an informational report that is filed at regular intervals.

One-time report

a report that presents the results of a special or long-term project.

Memorandum Report

a short, internal report presented in memo format.

Frequency of Submission

- **Periodic Reports**
- **One-time Reports**

Common Categories

Formats and Distribution

- **Memorandum Report**
 - 1- to ¼-inch side margins,
 - the standard guidewords TO, FROM, DATE, and SUBJECT, and
 - single-spaced paragraphs separated by two blank lines.
- **Prepared-form report**
- **Letter Report**
- **Formal Report**

Direct and Indirect Approaches

Direct Approach: Informational and Analytical Reports

- **Purpose/Introduction/Background**
- **Facts and Findings**
- **Summary**

- **Introduction/Problem/Background**
- **Conclusions or Recommendations**
- **Facts and Findings**
- **Discussion and Analysis**

Indirect Approach: Analytical Reports

- **Purpose/Introduction/Problem**
- **Facts and Findings**
- **Discussion and Analysis**
- **Conclusions or Recommendations.**

Headings

title or subtitle, usually a word or short phrase, within the body of a document that identifies its parts and gives clues to its organization.

Functional Heading

each of a series of generic headings that, when taken together, show a report in outline.

Descriptive head

a heading that describes the actual content of a report and provides more information about it.

Headings

1. **Use either functional or descriptive headings.**
2. **Keep headings short and clear.**
3. **Use parallel construction.**
4. **Ensure headings are clearly ranked.**
5. **Put headings where they belong.**
6. **Don't enclose headings in quotation marks.**
7. **Don't use a heading as the antecedent for a pronoun.**

Alphanumeric Outline

an outlining system that combines numbers and letters to differentiate levels of headings.

Decimal outline

an outlining system that uses a combination of numbers and decimal points to differentiate levels of headings.

Introduction

the first section in the body of a report, which provides readers with the information they need in a order to understand and evaluate the report itself; it must include either the report's purpose or a statement of the problem the report addresses.

Findings

the most substantial parts of a report, in which qualitative and numeric data is presented and organized by time, convention, order of importance, or component.

Summary

the closing or second-last section of a report that briefly restates its main points.

Conclusions and Recommendations

the closing section of an analytical or recommendation report in which specific actions are proposed to solve a problem or aid decision-making.

Visual Aids

material that present information in visually appealing ways to show trends and relationships, represent numbers and quantities, and concepts concrete.

Table

a chart that presents data, usually numerical, in a compact and systematic arrangement of rows and columns.

Matrixes

Matrixes

a word table containing qualitative information rather than numerical data.

Pie Chart

a circular diagram presenting data as wedge-shaped segments showing proportions or percentages of the whole.

Bar chart

a visual consisting of parallel horizontal or vertical bars of varying lengths, each representing a specific item for comparison.

Segmented bar chart

a visual consisting of a single bar divided according to the different portions that make up an item as a whole.

Deviation bar chart

a specific type of bar chart that shows positive and negative values.

Picture Graph

a visual that uses pictorial symbols to represent particular items.

Line Graph

a visual that uses lines on a grid to show trends according to the relationship between two variables or sets of numbers.

Grouped line graph

a line graph that makes comparisons between two or more items.

Grantt chart

a bar chart that is used to show a schedule.

Flow chart

a diagram that maps out procedures, processes, or sequences of movement.

Organizational chart

a diagram that shows how various levels or sectors of an organization are related to one another.

Informational Reports

Incident report

a short report that documents problems and unexpected occurrences that affect a company's day-to-day operations

Investigative Report

a report written in response to a request for information about a specific problem or situation.

Recommendation Report

an analytical report that recommends action, often in response to a specific problem.

Justification Report

an analytical report that justifies the need for a purchase, investments policy change or hiring.

Feasibility Report

an analytical report that evaluates whether a project or alternative is advisable and practical.

Proposal

a document presenting plans and ideas for consideration and acceptance by the reader.

Trip report

a short reports that summarizes the events of a business trip or conference.

Progress and activity report

a short report that provides information on the status of a project, including current work, work done during the time since the previous report, and work to be completed in the next period.

Chapter 11: PROPOSALS AND FORMAL REPORTS

Proposal

A business document that suggests a method for solving a problem or seeks approval for a plan.

Internal Proposal

A persuasive document that attempts to convince management to spend money or implement plans to change or improve the organization.

External proposal

A proposal issued to governmental or private industry clients outside an organization as a means of generating income.

Request for proposals

A detailed document requesting proposals and bids on specific projects.

Front matter

The parts of a proposal or report that are included before the main body.

Back Matter

The parts containing supplemental information that may follow the main body of a proposal or report.

Executive summary

A synopsis of the body of a proposal or report specifying its highlights and recommendations.

Researching and Collecting Data

- **In-house:** internal files, memos, reports
- **Publicly available:** consultants, experts, Internet, CD-ROMS
- **Restricted:** members-only Internet sites, research by other companies and organizations.

1. **Look for information online.**
2. **Do a computer-based search.**

3. **Find information in print.**
4. **Investigate primary, in-house sources.**
5. **Conduct interviews.**
6. **Quantify Observations**

Formal Reports

Formal report

an account of a major project written according to a prescribed structure defined by formal elements such as title page, letter of transmittal, table of contents, and executive summary or abstract.

Work plan

a document that defines the approach, personnel responsibilities, resource needs, and scheduling for a major project.

Team Writing

The practice of multiple writers working together to produce a single document.

Chapter 12: **ORAL COMMUNICATION**

Oral Presentation

an informative or persuasive speech delivered using only notes and visual aids to guide the speaker's performance.

Non-verbal communication

a form of communication that does not use words, only media such as gestures, eye contact, and tone of voice.

Visual aids

typically charts, graphs, and tables used to present data in clearly understandable and appealing ways.

Flip chart

a large stand-mounted writing pad with bound pages that can be turned over at the top.

Overhead projector

a device that projects the enlarged image of a transparency onto a screen.

PowerPoint

Presentation software offering standard templates and other features that aid in the design of integrated text and effective visuals.

Templates

a stored pattern for a document from which new documents can be made.

Impromptu speaking

a delivery method in which the speaker makes remarks without the aid of prepared notes.

Extemporaneous Speaking

a method of delivery in which the speaker relies on notes rather than manuscript memorization.

Special-occasion presentation

a speech made in appreciation, in acceptance of an award, in commemoration of an event, or by way of

introduction.

Internal meeting

a formal meeting that involves only personnel from within an organization.

External meeting

a formal meeting that involves outsiders in addition to company personnel.

Formal meeting

a scheduled meeting that operates according to a pre-set agenda under guided leadership for the purposes of achieving specific goals.

Informal meeting

a small, sometimes unscheduled meeting that may operate without strict rules.

Agenda

a document that establishes the purpose and goals of a meeting and outlines what the meeting will address, thereby helping to focus the group.

Groupthink

the practice of thinking or making decisions as a group, whereby conformity is rewarded and dissent punished; the result of groupthink is often poor decision-making.

Active listening

listening that demands close attention to the literal and emotional meaning of message and level of responsiveness that shows the speaker of the message was both heard and understood.

Meeting minutes

a written record of what occurred at a meeting, who attended it, and when and where it was convened.

Groupware

software designed to facilitate group work by a number of different users.

Web-conferencing

synchronous web-supported communication allowing for the real-time transmission of sound and images to other locations.

Sound bite

a short, quotable extract from a recorded interview that is edited into a news broadcast.
