

acknowledgments

When a colleague or client sends you something or makes a request, you should acknowledge what was sent, respond to the request, or explain that you cannot respond to the request immediately in a short, polite note. The message shown in Figure 4-1 could be sent as a letter, an e-mail (Tab 2), or a text message (Tab 2). See also correspondence.

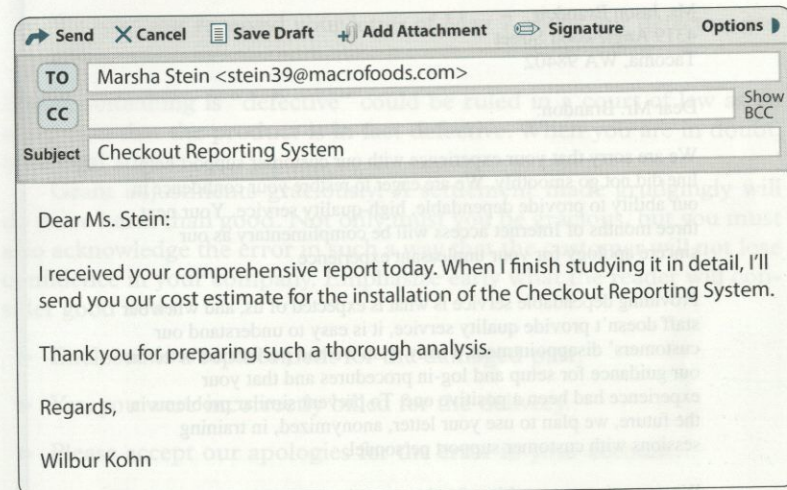


FIGURE 4-1. Acknowledgment

adjustments

An adjustment letter or e-mail (Tab 2) is written in response to a complaint and tells a customer or client what your organization intends to do about the complaint. Although sent in response to a problem, an adjustment letter actually provides an excellent opportunity to build goodwill for your organization. An effective adjustment letter, such as the examples shown in Figures 4-2 and 4-3, can not only repair any damage done but also restore the customer's confidence in your company. See also complaints.

No matter how unreasonable the complaint, the tone (Tab 10) of your response should be positive and respectful. Avoid emphasizing the problem, but do take responsibility for it when appropriate. Focus your response on what you are doing to correct the problem. Settle such matters quickly and courteously, and lean toward giving the customer or

Preview

The process of writing business messages involves many of the same steps that go into most other on-the-job writing tasks, as described in "Five Steps to Successful Writing" (page xxv). This section contains entries on the general principles of correspondence that will help you get the most out of specific entries on such forms as e-mail (Tab 2), letters, and memos. Other entries in this section cover specific situations, such as complaints and adjustments as well as international correspondence. For choosing the best medium for corresponding, see selecting the medium (Tab 2).

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Explore how professionals communicate in the workplace. Go to the e-Pages at bedfordstmartins.com/bwc to evaluate sample correspondence.

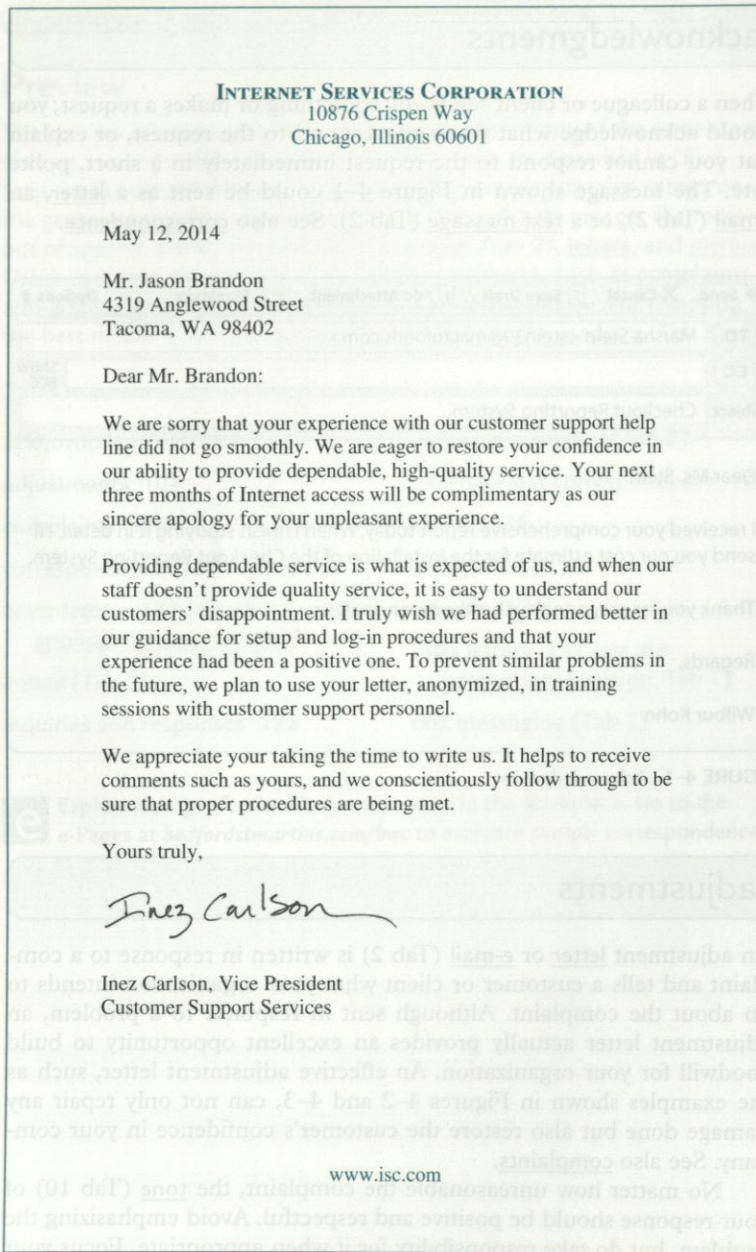


FIGURE 4-2. Adjustment Letter (Company Takes Responsibility)

client the benefit of the doubt at a reasonable cost to your organization. See also [refusals](#).

Full Adjustments

Before granting an adjustment to a claim for which your company is at fault, first determine what happened and what you can do to satisfy the customer. Be certain that you are familiar with your company's adjustment policy—and be careful with [word choice](#) (Tab 10).

- ▶ We have just received your letter of May 7 about our defective gas grill.

Saying something is “defective” could be ruled in a court of law as an admission that the product is in fact defective. When you are in doubt, seek legal advice.

Grant adjustments graciously: A settlement made grudgingly will do more harm than good. Not only must you be gracious, but you must also acknowledge the error in such a way that the customer will not lose confidence in your company. Emphasize early what the reader will consider good news.

- ▶ Enclosed is a replacement for the damaged part.
- ▶ Yes, you were incorrectly billed for the delivery.
- ▶ Please accept our apologies for the error in your account.

PROFESSIONALISM NOTE If an explanation will help restore your reader's confidence, explain what caused the problem. You might point out any steps you may be taking to prevent a recurrence of the problem. Explain that customer feedback helps your firm keep the quality of its product or service high. Close pleasantly, looking forward, not back. Avoid recalling the problem in your closing (do not write, “Again, we apologize . . .”).

The adjustment letter in Figure 4-2, for example, begins by accepting responsibility and offers an apology for the customer's inconvenience (note the use of the pronouns *we* and *our*). The second paragraph expresses a desire to restore goodwill and describes specifically how the writer intends to make the adjustment. The third paragraph expresses appreciation to the customer for calling attention to the problem and assures him that his complaint has been taken seriously.

Partial Adjustments

You may sometimes need to grant a partial adjustment—even if a claim is not really justified—to regain the lost goodwill of a customer or

client. If, for example, a customer incorrectly uses a product or service, you may need to help that person better understand the correct use of that product or service. In such a circumstance, remember that your customer or client believes that his or her claim is justified. Therefore, you should give the explanation before granting the claim—otherwise, your reader may never get to the explanation. If your explanation establishes customer responsibility, do so tactfully. Figure 4-3 is an example of a partial adjustment message. See also [correspondence](#).

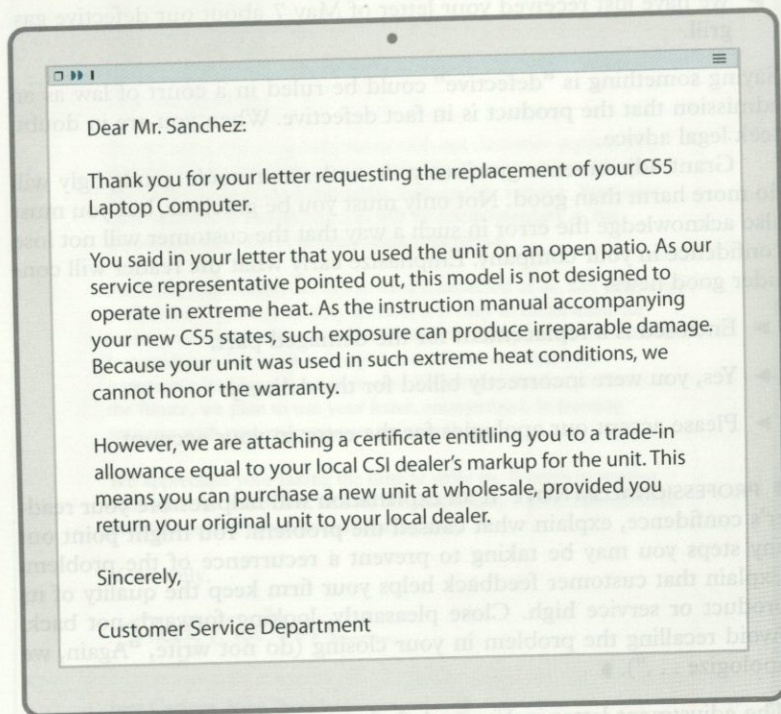


FIGURE 4-3. Partial Adjustment (Accompanying a Product)

complaints

A complaint [letter](#) or [e-mail](#) (Tab 2) describes a problem that the writer requests the recipient to solve. The [tone](#) (Tab 10) of a complaint letter

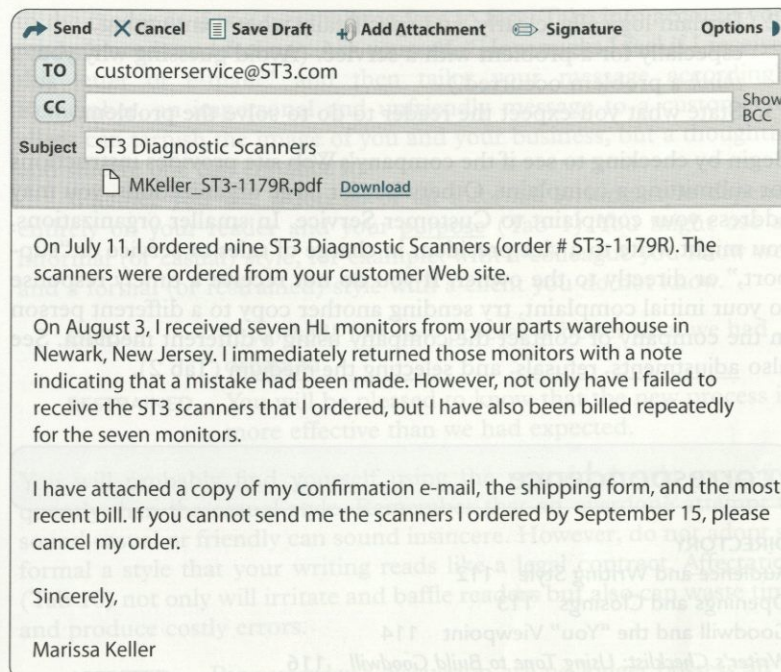


FIGURE 4-4. Complaint Message

or e-mail is important; the most effective ones do not sound complaining. If your message is shrill and belligerent, you may not be taken seriously. Assume that the recipient will be conscientious in correcting the problem. However, anticipate reader reactions or rebuttals. See [audience](#) (Tab 1).

- ▶ I reviewed my user manual's "safe operating guidelines" carefully before I installed the device. [This assures readers you followed instructions.]

Without such explanations, readers may be tempted to dismiss your complaint. Figure 4-4 shows a complaint letter that details a billing problem. Although the circumstances and severity of the problem may vary, effective complaint letters generally follow this pattern:

1. Identify the problem or faulty item(s) and include relevant invoice numbers, part names, and dates. Include a copy of the receipt, bill, or contract, and keep the original for your records.

2. Explain logically, clearly, and specifically what went wrong, especially for a problem with a service. (Avoid guessing why you *think* a problem occurred.)
3. State what you expect the reader to do to solve the problem.

Begin by checking to see if the company's Web site provides instructions for submitting a complaint. Otherwise, for large organizations, you may address your complaint to Customer Service. In smaller organizations, you might write to a vice president in charge of sales or service or "support," or directly to the owner. If you do not receive a timely response to your initial complaint, try sending another copy to a different person in the company or contact the company using a different medium. See also adjustments, refusals, and selecting the medium (Tab 2).

correspondence

DIRECTORY

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Correspondence in the workplace—whether through e-mail (Tab 2), letters, memos, or another medium—requires many of the steps described in "Five Steps to Successful Writing" (page xxv). As you prepare even a simple e-mail, for example, you might study previous messages (research) and then list or arrange the points you wish to cover (organization) in an order that is logical for your readers. See also selecting the medium (Tab 2).

Corresponding with others in the workplace also requires that you focus on both establishing or maintaining a positive working relationship with your readers and conveying a professional image of yourself and your organization. See also audience (Tab 1).

Audience and Writing Style

Effective correspondence uses an appropriate conversational style. To achieve that style, imagine your reader sitting across from you and write

to the reader as if you were talking face to face. Take into account your reader's needs and feelings. Ask yourself, "How might I feel if I received this letter or e-mail?" and then tailor your message accordingly. Remember, an impersonal and unfriendly message to a customer or client can tarnish the image of you and your business, but a thoughtful and sincere one can enhance it.

Whether you use a formal or an informal writing style depends entirely on your reader and your purpose (Tab 1). You might use an informal (or casual) style, for example, with a colleague you know well and a formal (or restrained) style with a client you do not know.

- CASUAL** It worked! The new process is better than we had dreamed.
- RESTRAINED** You will be pleased to know that the new process is more effective than we had expected.

You will probably find yourself using the restrained style more frequently than the casual style. Remember that an overdone attempt to sound casual or friendly can sound insincere. However, do not adopt so formal a style that your writing reads like a legal contract. Affectation (Tab 10) not only will irritate and baffle readers but also can waste time and produce costly errors.

- AFFECTED** Per yesterday's discussion, we no longer possess an original copy of the brochure requested. Please be advised that a PDF copy is attached herewith to this e-mail.
- IMPROVED** We are out of original copies of the brochure we discussed yesterday, so I am attaching a PDF copy to this e-mail.

The improved version is not only clearer and less stuffy but also more concise. See also business writing style (Tab 10) and conciseness (Tab 10).

Openings and Closings

The opening of any correspondence should identify the subject and often the main point of the message.

- ▶ Attached is the final installation report, which I hope you can review by Monday, December 15. You will notice that the report includes . . .

When your reader is not familiar with the subject or with the background of a problem, you may provide an introductory paragraph before stating the main point of the message. Doing so is especially important

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in correspondence that will serve as a record of crucial information. Generally, longer or complex subjects benefit most from more thorough introductions (Tab 1). However, even when you are writing a short message about a familiar subject, remind readers of the context (Tab 1). In the following example, words that provide context are shown in *italics*.

- ▶ *As Maria recommended*, I reviewed the office reorganization plan. I like most of the features; however, the location of the receptionist and assistant . . .

Do not state the main point first when (1) readers are likely to be highly skeptical or (2) key readers, such as managers or clients, may disagree with your position. In those cases, a more persuasive tactic is to state the problem or issue first, then present the specific points supporting your final recommendation, as discussed later under the *indirect pattern* on page 117. See also persuasion (Tab 1).

Your closing can accomplish many important tasks, such as building positive relationships with readers, encouraging colleagues and employees, letting recipients know what you will do or what you expect of them, and noting any assignment deadlines.

- ▶ I will discuss the problem with the marketing consultant and let you know by Wednesday (August 6) what we are able to change.

Routine statements are sometimes unavoidable. (“If you have further questions, please let me know.”) However, try to make your closing work for you by providing specific prompts to which the reader can respond. See also conclusions (Tab 1).

- ▶ Thanks again for the report, and let me know if you want me to send you a copy of the test results.

Goodwill and the “You” Viewpoint

Write concisely, but do not be so blunt that you risk losing the reader’s goodwill. Responding to a vague written request with “Your request was unclear” or “I don’t understand” could offend your reader. Instead, establish goodwill to encourage your reader to provide the information you need.

- ▶ I will be glad to help, but I need additional information to locate the report you requested. Specifically, can you give me the report’s title, release date, or number?

Although this version is a bit longer, it is more tactful and will elicit a helpful response. See also telegraphic style (Tab 10).

You can also build goodwill by emphasizing the reader’s needs or benefits. Suppose you received a refund request from a customer who forgot to include the receipt with the request. In a response to that customer, you might write the following:

- WEAK** We must receive the sales receipt before we can process a refund. [The writer’s needs are emphasized: “*We must.*”]

If you consider how to keep the customer’s goodwill, you could word the request this way:

- IMPROVED** Please send the sales receipt so that we can process your refund. [Although polite, the sentence still focuses on the writer’s needs: “so that *we* can process.”]

You can put the reader’s needs and interests foremost by writing from the reader’s perspective. Often, doing so means using the words *you* and *your* rather than *we*, *our*, *I*, and *mine*—a technique called the “you” viewpoint (Tab 10). Consider the following revision:

- EFFECTIVE** So that you can receive your refund promptly, please mail or fax the sales receipt. [The reader’s needs are emphasized with *you* and *your*.]

This revision stresses the reader’s benefit and interest. By emphasizing the reader’s needs, the writer will be more likely to accomplish the purpose: to get the reader to act. See also positive writing (Tab 10).

If overdone, however, goodwill and the “you” viewpoint can produce writing that is fawning and insincere. Messages that are full of excessive praise and inflated language may be ignored—or even resented—by the reader.

- EXCESSIVE PRAISE** You are just the kind of astute client that deserves the finest service that we can offer—and you deserve our best deal. Understanding how carefully you make decisions, I know you’ll think about the advantages of using our consulting service.

- REASONABLE** From our earlier correspondence, I understand your need for reliable service. We strive to give all our priority clients our full attention, and after you have reviewed our proposal I am confident you will appreciate our “five-star” consulting option.

Writer's Checklist: Using Tone to Build Goodwill

Use the following guidelines to achieve a **tone** (Tab 10) that builds goodwill with your recipients.

- ☑ Be respectful, not demanding.
 - DEMANDING** Submit your answer in one week.
 - RESPECTFUL** I would appreciate your answer within one week.
- ☑ Be modest, not arrogant.
 - ARROGANT** My attached report is thorough, and I'm sure that you won't be able to continue without it.
 - MODEST** The attached report contains details of the refinancing options that I hope you will find useful.
- ☑ Be polite, not sarcastic.
 - SARCASTIC** I just now received the shipment we ordered six months ago. I'm sending it back—we can't use it now. Thanks a lot!
 - POLITE** I am returning the shipment we ordered on March 12. Unfortunately, it arrived too late for us to be able to use it.
- ☑ Be positive and tactful, not negative and condescending.
 - NEGATIVE** Your complaint about our prices is way off target. Our prices are definitely not any higher than those of our competitors.
 - TACTFUL** Thank you for your suggestion concerning our prices. We believe, however, that our prices are comparable to or lower than those of our competitors.

Direct and Indirect Patterns

Direct Pattern. The direct pattern is effective in workplace correspondence because readers appreciate messages that get to the main point quickly. The direct pattern shown in the following list also accomplishes the goals described on page 113.

1. Main point of message
2. Explanation of details or facts
3. Goodwill closing

The direct pattern is especially appropriate for presenting good news, as shown in Figure 4-5. This message presents the good news in the opening (the main point), follows with an explanation of the facts, and closes by looking toward the future (goodwill). The direct pattern may also be

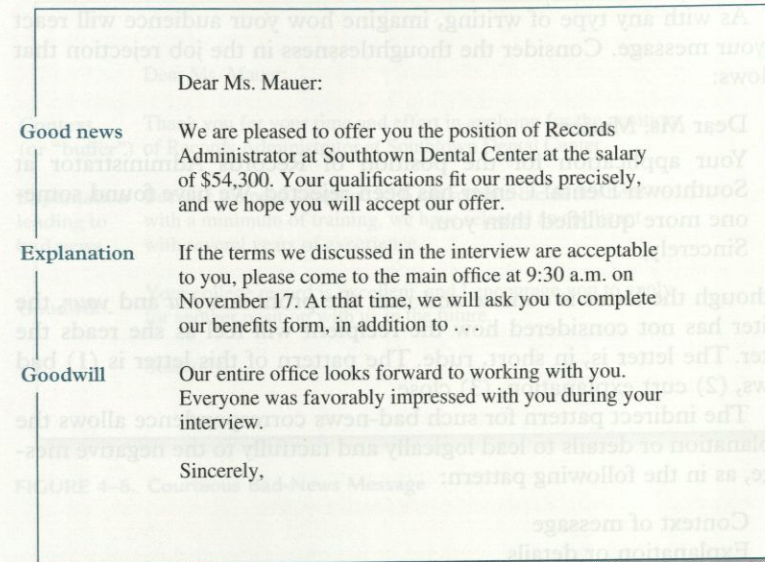


FIGURE 4-5. Good-News Message

appropriate for negative messages in situations where little is at stake for the writer or reader and the reasons for the negative message are relatively unimportant.

► **Dear Mr. Coleman:**

We do not have the part you requested currently in stock, but we hope to have it within the next month. Our supplier, who has been reliable in the past, assures us that the manufacturer that produces those parts will be able . . . [Continues with details and goodwill closing.]

Indirect Pattern. The indirect pattern may be effective when you need to present especially sensitive or negative messages in correspondence. Research has shown that people form their impressions and attitudes very early when reading correspondence. For this reason, presenting bad news, refusals, or sensitive messages *indirectly* is often more effective than presenting negative information directly, especially if the stakes are high.* See also **refusals**.

*Gerald J. Alred, "We Regret to Inform You": Toward a New Theory of Negative Messages," in *Studies in Technical Communication*, ed. Brenda R. Sims (Denton: University of North Texas and NCTE, 1993), 17-36.

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As with any type of writing, imagine how your audience will react to your message. Consider the thoughtlessness in the job rejection that follows:

► Dear Ms. Mauer:

Your application for the position of Records Administrator at Southtown Dental Center has been rejected. We have found someone more qualified than you.

Sincerely,

Although the letter is concise and uses the pronouns *you* and *your*, the writer has not considered how the recipient will feel as she reads the letter. The letter is, in short, rude. The pattern of this letter is (1) bad news, (2) curt explanation, (3) close.

The indirect pattern for such bad-news correspondence allows the explanation or details to lead logically and tactfully to the negative message, as in the following pattern:

1. Context of message
2. Explanation or details
3. Bad news or negative message
4. Goodwill closing

The opening (traditionally called a “buffer”) should provide a context for the subject and establish a professional tone. However, it must not mislead the reader to believe that good news may follow, and it must not contain irrelevant information.*

The body should provide an explanation by reviewing the details or facts that lead to a negative decision or refusal. Give the negative message simply, based on the facts; do not belabor the bad news or provide an inappropriate apology. Neither the details nor an overdone apology can turn bad news into something positive. Your goal should be to establish for the reader that the writer or organization has been *reasonable* given the circumstances. To accomplish this goal, you need to organize the explanation carefully and logically.

The closing should establish or reestablish a positive relationship through goodwill or helpful information. Consider, for example, the revised bad-news letter, shown in Figure 4-6. This letter carries the same disappointing news as the message above, but the writer of this letter begins by not only introducing the subject but also thanking the reader for her time and effort. Then the writer explains why Ms. Mauer was not accepted for the job and offers her encouragement by looking

*Kitty O. Locker, “Factors in Reader Responses to Negative Letters: Experimental Evidence for Changing What We Teach,” *Journal of Business and Technical Communication* 13, no. 1 (January 1999): 29.

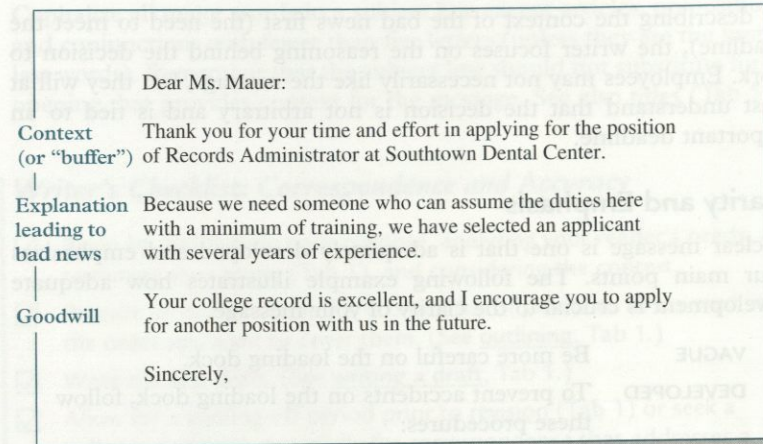


FIGURE 4-6. Courteous Bad-News Message

toward a potential future opportunity. Bad news is never pleasant; however, information that either puts the bad news in perspective or makes the bad news reasonable maintains respect between the writer and the reader. The goodwill closing reestablishes an amicable professional relationship.

The indirect pattern can also be used in relatively short e-mail messages and memos. Consider the unintended secondary message a manager conveys in the following notice:

WEAK It has been decided that the office will be open the day after Thanksgiving.

“It has been decided” not only sounds impersonal but also communicates an authoritarian, management-versus-employee tone. The passive voice also suggests that the decision maker does not want to say “I have decided” and thus accept responsibility for the decision. One solution is to remove the first part of the sentence.

IMPROVED The office will be open the day after Thanksgiving.

The best solution, however, would be to suggest both that there is a good reason for the decision and that employees are privy to (if not a part of) the decision-making process.

EFFECTIVE Because we must meet the December 15 deadline for submitting the Bradley Foundation proposal, the office will be open the day after Thanksgiving.

By describing the context of the bad news first (the need to meet the deadline), the writer focuses on the reasoning behind the decision to work. Employees may not necessarily like the message, but they will at least understand that the decision is not arbitrary and is tied to an important deadline.

Clarity and Emphasis

A clear message is one that is adequately developed and emphasizes your main points. The following example illustrates how adequate development is crucial to the clarity of your message.

VAGUE	Be more careful on the loading dock.
DEVELOPED	To prevent accidents on the loading dock, follow these procedures:
	1. Check to make sure . . .
	2. Load only items that are rated . . .
	3. Replace any defective parts . . .

Although the first version is concise, it is not as clear and specific as the “developed” revision. Do not assume your readers will know what you mean: Vague messages are easily misinterpreted.

Lists. Vertically stacked words, phrases, and other items with numbers or bullets can effectively highlight such information as steps in a sequence, materials or parts needed, key or concluding points, and recommendations. As described in [lists](#) (Tab 7), provide context and be careful not to overuse lists. A message that consists almost entirely of lists is difficult to understand because it forces readers to connect separate and disjointed items. Further, lists lose their impact when they are overused.

Headings. [Headings](#) (Tab 7) are particularly useful because they call attention to main topics, divide material into manageable segments, and signal a shift in subject. Readers can scan the headings and read only the section or sections appropriate to their needs.

Subject Lines. Subject lines for e-mails, memos, and some letters announce the topic and focus of the correspondence. Because they also aid filing and later retrieval, they must be specific and accurate.

VAGUE	Subject: Tuition Reimbursement
VAGUE	Subject: Time-Management Seminar
SPECIFIC	Subject: Tuition Reimbursement for Time-Management Seminar

Capitalize all major words in a subject line except articles, prepositions, and conjunctions with fewer than five letters (unless they are the first or last words). Remember that the subject line should not substitute for an opening that provides context for the message. See also [titles](#) (Tab 5).

Writer's Checklist: Correspondence and Accuracy

- Begin by establishing your purpose, analyzing your reader's needs, determining your [scope](#) (Tab 1), and considering the context.
- Prepare an outline, even if it is only a list of points to be covered in the order you want to cover them. (See [outlining](#), Tab 1.)
- Write the first draft. (See [writing a draft](#), Tab 1.)
- Allow for a cooling-off period prior to [revision](#) (Tab 1) or seek a colleague's advice, especially for correspondence that addresses a problem.
- Revise the draft, checking for key problems in clarity and [coherence](#) (Tab 10).
- Use the appropriate or standard format, for example as in [letters](#) and [memos](#).
- Check for accuracy: Make sure that all facts, figures, and dates are correct.
- Use effective [proofreading](#) (Tab 1) techniques to check your punctuation and usage (see the Appendix, “Usage”). See also Tab 12, “Punctuation and Mechanics.”
- Consider who should receive a copy of the message and in what order the names or e-mail addresses should be listed (alphabetize if rank does not apply).
- Remember that when you sign a letter or send a message, you are accepting responsibility for it.

cover letters

A cover [letter](#), a [memo](#), or an [e-mail](#) (Tab 2) accompanies a document, an electronic file, or other material. It identifies an item that is being sent, the person to whom it is being sent, the reason that it is being sent, and any content that should be highlighted for readers. A cover letter (or *transmittal*) provides a permanent record for both the writer and the reader. For cover letters to résumés, see [application cover letters](#) (Tab 9).

The example in Figure 4-7 is concise, but it also includes details such as how the information for the report was gathered.

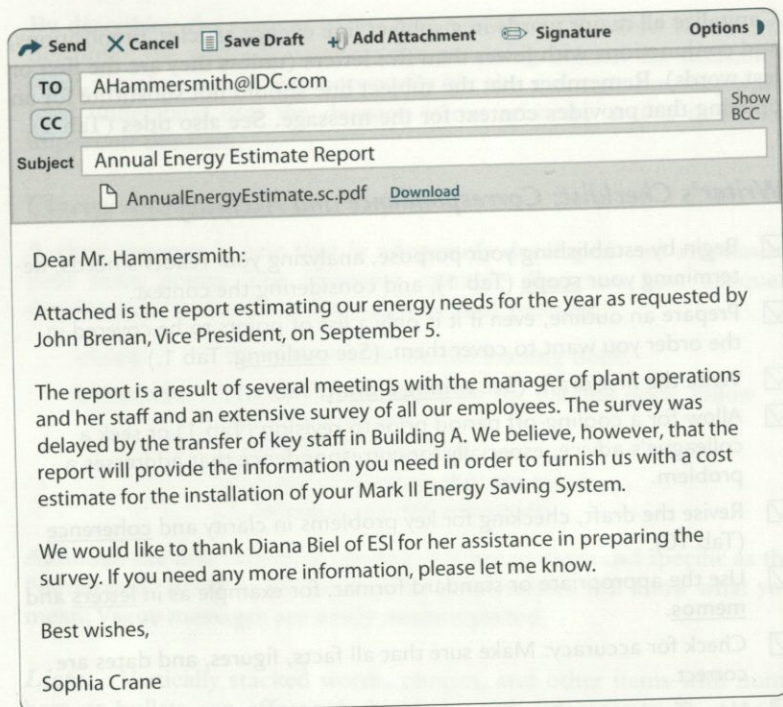


FIGURE 4-7. Cover Message

inquiries and responses

The purpose of writing inquiry messages is to obtain responses to requests or specific questions, as in Figure 4-8, which shows a college student's request for information from an official at a power company. Inquiries may benefit either the reader (as in requests for information about a product that a company sells) or the writer (as in the student's inquiry in Figure 4-8). Inquiries that primarily benefit the writer require the use of persuasion (Tab 1) and special consideration of the needs of your audience (Tab 1). See also correspondence.

Writer's Checklist: Writing Inquiries

- Make your questions specific, clear, and concise to receive a prompt, helpful reply.
- Phrase your request so that the reader will know immediately the type of information you are seeking, why you need it, and how you will use it.

Writer's Checklist: Writing Inquiries (continued)

- If possible, present questions in a numbered or bulleted list (Tab 7) to make it easy for your reader to respond to them.
- Keep the number of questions to a minimum to improve your chances of receiving a prompt response.
- Offer some inducement for the reader to respond, if possible, such as promising to share the results of what you are doing. See also "you" viewpoint (Tab 10).
- Promise to keep responses confidential, when appropriate.
- Provide a date by which you need a response.
- Close by thanking the reader for taking the time to respond and provide your contact information, as shown in Figure 4-8.

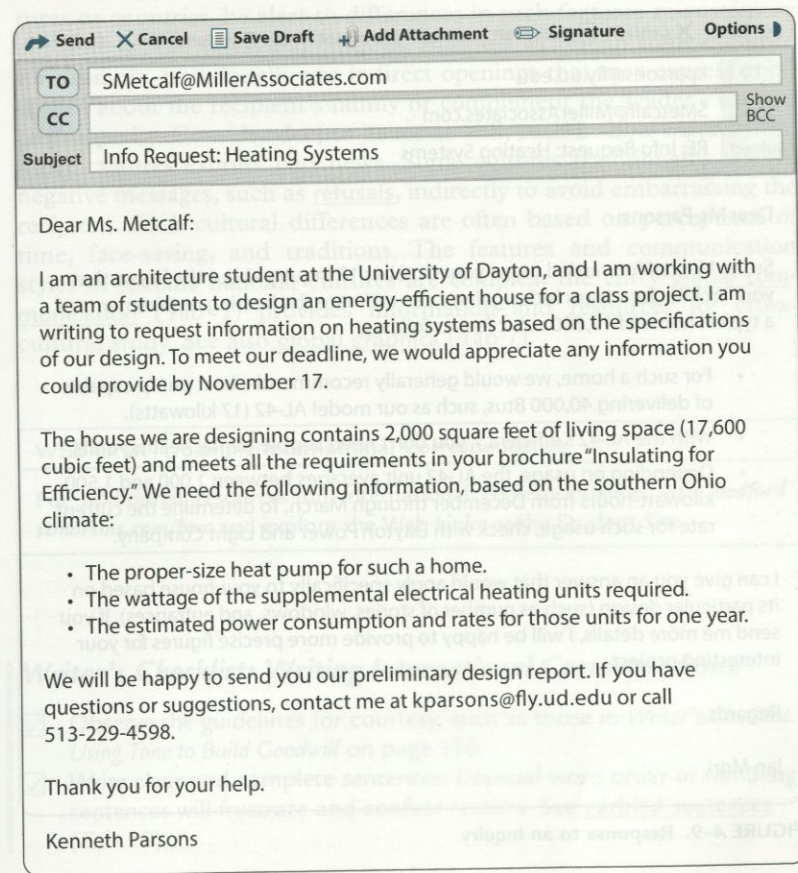


FIGURE 4-8. Inquiry

Responding to Inquiries

When you receive an inquiry, determine whether you have both the information and the authority to respond. If you are the right person in your organization to respond and you understand your organization's policy about the issue, answer as promptly as you can, and be sure to answer every inquiry or question asked, as shown in Figure 4-9. How long and how detailed your response should be depends on the nature of the question and the information the writer provides.

If you have received an inquiry that you feel you cannot answer, find out who can and forward the inquiry to that person. Notify the writer that you have forwarded the inquiry. The person who replies to the forwarded inquiry should state in the first paragraph of the response who has forwarded the original inquiry, as shown in Figure 4-9.

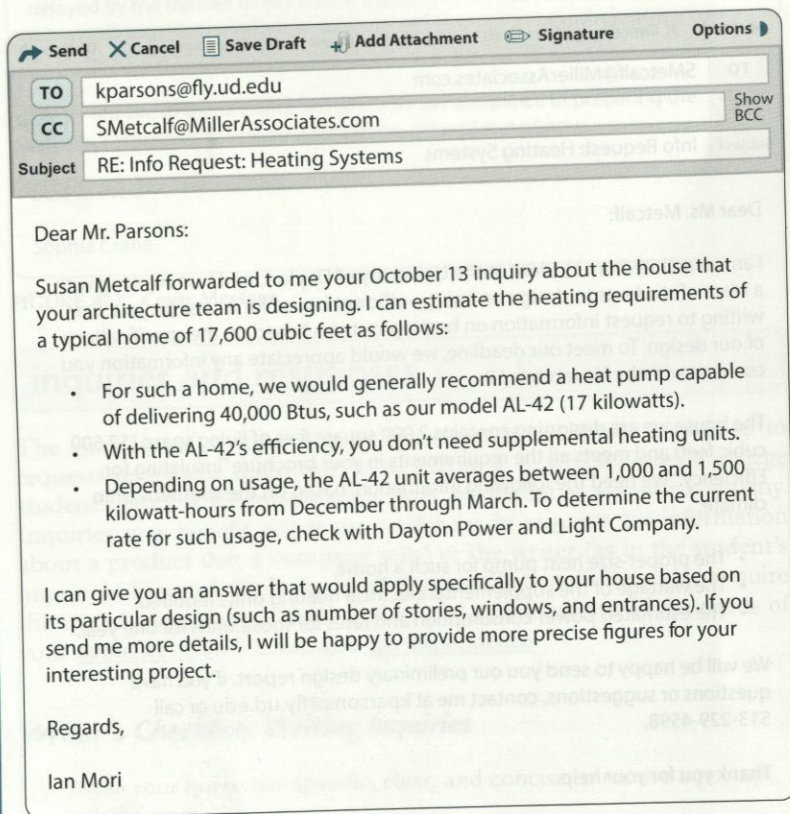


FIGURE 4-9. Response to an Inquiry

international correspondence

Business correspondence varies among national cultures. Organizational patterns, persuasive strategies, forms of courtesy, formality, and ideas about efficiency differ from country to country. For example, in the United States, direct, concise correspondence usually demonstrates courtesy by not wasting the reader's time. In many other countries, however, such directness and brevity may seem rude to readers, suggesting that the writer is dismissive or lacking in manners. (See audience, Tab 1, and tone, Tab 10.) Likewise, where a U.S. writer might consider one brief letter or e-mail (Tab 2) sufficient to communicate a request, a writer in another country may expect an exchange of three or four longer letters to pave the way for action.

When you read correspondence from businesspeople in other cultures or countries, be alert to differences in such features as customary expressions, openings, and closings. Business writers in some cultures, for example, traditionally use indirect openings that may express good wishes about the recipient's family or compliment the reader's success or prosperity. Consider deeper issues as well, such as how writers from other cultures express bad news. Some cultures traditionally express negative messages, such as refusals, indirectly to avoid embarrassing the recipient. Such cultural differences are often based on perceptions of time, face-saving, and traditions. The features and communication styles of specific national cultures are complex; the entry global communication (Tab 1) provides information and resources for cross-cultural study. See also global graphics (Tab 7).

WEB LINK

Sample International Correspondence

For additional resources on international correspondence, visit bedfordstmartins.com/bwc and explore the Web Links at the Student Site.

Writer's Checklist: Writing International Correspondence

- Observe the guidelines for courtesy, such as those in *Writer's Checklist: Using Tone to Build Goodwill* on page 116.
- Write clear and complete sentences: Unusual word order or rambling sentences will frustrate and confuse readers. See garbled sentences (Tab 10).

Writer's Checklist: Writing International Correspondence (continued)

- ✓ Avoid an overly simplified style that may offend or any **affectation** (Tab 10) that may confuse the reader. See also **English as a second language** (Tab 11).
- ✓ Avoid humor, irony, and sarcasm; they are easily misunderstood outside their cultural **context** (Tab 1).
- ✓ Do not use idioms, jargon, slang expressions, unusual figures of speech, or allusions to events or attitudes particular to American life. See Tab 10, "Style and Clarity."
- ✓ Consider whether necessary technical terminology can be found in abbreviated English-language dictionaries; if it cannot, carefully define such terminology.
- ✓ Do not use contractions or abbreviations that may not be clear to international readers.
- ✓ Avoid inappropriate informality, such as using first names too quickly.
- ✓ Write out **dates** (Tab 12), whether in the month-day-year style (*June 11, 2014* not *6/11/14*) used in the United States or the day-month-year style (*11 June 2014* not *11/6/14*) used in many other parts of the world.
- ✓ Specify time zones or refer to international standards, such as Greenwich Mean Time (GMT) or "Universal Time Coordinated" (UTC).
- ✓ Use international measurement standards, such as the metric system (*18°C, 14 cm, 45 kg*), where possible.
- ✓ Ask someone from your intended audience's culture or with appropriate expertise to review your draft before you complete your final **proofreading** (Tab 1).

WEB LINK Open Directory International Listing

The Open Directory Project provides an International Business and Trade directory, which is an excellent starting point for searching the Web for information related to customs, communication, and international standards. For more information, visit bedfordstmartins.com/bwc and explore the Web Links at the Student Site.

letters

Business letters—normally written for those outside an organization—are often the most appropriate choice for formal communications with professional associates or customers. Letters may be especially effective for those people who receive a high volume of e-mail and other electronic

messages. Letters printed on organizational letterhead communicate formality, respect, and authority. See **correspondence** for advice on writing strategy and style. See also **selecting the medium** (Tab 2).

Although word-processing software includes templates for formatting business letters, the templates may not provide the appropriate dimensions and elements you need. The following sections offer specific advice on formatting and related etiquette for business letters.*

Letter Format

If your employer requires a particular letter format, use it. Otherwise, follow the design guidelines shown in Figure 4–10. Figure 4–10 illustrates the popular *full-block style* in which the entire letter is aligned at the left margin. To achieve a professional appearance, center the letter on the page vertically and horizontally. Regardless of the default margin provided in a word-processing program, it is more important to establish a picture frame of blank space surrounding the text of the letter. When you use organizational stationery with letterhead at the top of the page, consider the bottom of the letterhead as the top edge of the paper. The right margin should be approximately as wide as the left margin. To give a fuller appearance to very short letters, increase both margins to about an inch and a half. Use your full-page or print-preview feature to check for proportion.

Heading

Unless you are using letterhead stationery, place your full return address and the date in the heading. Because your name appears at the end of the letter, it need not be included in the heading. Spell out words such as *street, avenue, first, and west* rather than abbreviating them. You may either spell out the name of the state in full or use the standard Postal Service abbreviation available at www.usps.com. The date usually goes directly beneath the last line of the return address. Do not abbreviate the name of the month. Begin the heading about two inches from the top of the page. If you are using company letterhead that gives the address, enter only the date a minimum of three lines below the last line of the letterhead.

Inside Address

The inside address is the recipient's full name, title, and address. Place the inside address two to six lines below the date, depending on the length of the letter. This address should be aligned with the left margin.

*For additional details on letter formats and design, you may wish to consult a guide such as *The Gregg Reference Manual*, 11th ed., by William A. Sabin (New York: McGraw-Hill, 2010).

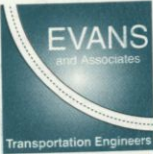
Letterhead	<p>520 Niagara Street Braintree, MA 02184</p> <p>Phone: (781) 787-1175 Fax: (781) 787-1213 EvansTE.com</p> 
Date	May 15, 2014
Inside address	<p>Mr. George W. Nagel Director of Operations Boston Transit Authority 57 West City Avenue Boston, MA 02210</p>
Salutation	Dear Mr. Nagel:
Body	<p>Enclosed is our final report evaluating the safety measures for the Boston Intercity Transit System.</p> <p>We believe that the report covers the issues you raised in our last meeting and that you will be pleased with the results. However, if you have any further questions, we would be happy to meet with you again at your convenience.</p> <p>We would also like to express our appreciation to Mr. L. K. Sullivan of your committee for his generous help during our trips to Boston.</p>
Complimentary closing	Sincerely,
Signature	<i>Carolyn Brown</i>
Writer's signature block	<p>Carolyn Brown, Ph.D. Director of Research cbrown@EvansTE.com</p>
End notations	<p>CB/ls Enclosure: Final Safety Report cc: ITS Safety Committee Members</p>

FIGURE 4-10. Full-Block-Style Letter (with Letterhead)

Salutation

Place the salutation, or *greeting*, two lines below the inside address and align it with the left margin. In most business letters, the salutation contains the recipient's personal title (such as *Mr.*, *Ms.*, *Dr.*) and last name, followed by a colon. If you are on a first-name basis with the recipient, use only the first name in the salutation.

Address women as *Ms.* unless they have expressed a preference for *Miss* or *Mrs.* However, professional titles (such as *Professor*, *Senator*, *Major*) take precedence over *Ms.* and similar courtesy titles.

When a person's first name could be either feminine or masculine, one solution is to use both the first and last names in the salutation (*Dear Pat Smith:*). Avoid "To Whom It May Concern" because it may seem impersonal and dated.

For multiple recipients, the following salutations are appropriate:

- ▶ Dear Professor Allen and Dr. Rivera: [two recipients]
- ▶ Dear Ms. Becham, Ms. Moore, and Mr. Stein: [three recipients]
- ▶ Dear Colleagues: [*Members*, or other suitable collective term]

In circumstances in which you do not know the recipient's name, use a title appropriate to the context of the letter, such as *Dear Customer* or *Dear IT Professional*.

Subject Line

An optional element in a letter is a subject line, which should follow the salutation. Insert one blank line above and one blank line below the subject line. The subject line in a letter functions as it does for other correspondence as an aid in focusing the topic and filing the letter. (For information on creating subject lines, see pages 120–121 of *correspondence*.)

- ▶ National Medical Supply Group
501 West National Avenue
Minneapolis, MN 55407

Attention: Customer Service Department

Subject: Defective Cardio-100 Stethoscopes

I am returning six stethoscopes with damaged diaphragms that . . .

Subject lines are especially useful if you are writing to a large company and do not know the name or title of the recipient. In such cases, you

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may address a letter to the attention of an appropriate department or identify the subject in a subject line and use no salutation.

Body

The body of the letter should begin two lines below the salutation (or any element that precedes the body, such as a subject or an attention line). Single-space within and double-space between paragraphs, as shown in Figure 4-10. To provide a fuller appearance to a short letter, you can increase the side margins or increase the font size. You can also insert extra space above the inside address, the writer's signature block, and the initials of the person typing the letter—but do not exceed twice the recommended space for each of these elements.

Complimentary Closing

Type the complimentary closing two spaces below the body. Use a standard expression such as *Sincerely*, *Sincerely yours*, or *Yours truly*. (If the recipient is a friend as well as a business associate, you can use a less-formal closing such as *Best wishes* or *Best regards* or, simply, *Best*.) Capitalize only the initial letter of the first word, and follow the expression with a comma.

Writer's Signature Block

Type your full name four lines below and aligned with the complimentary closing. On the next line include your business title, if appropriate. The following lines may contain your individual contact information, such as a telephone number or an e-mail address, if not included in the letterhead or the body of your letter. Sign the letter in the space between the complimentary closing and your name.

End Notations

Business letters sometimes require additional information that is placed at the left margin, two spaces below the typed name and title of the writer in a long letter, four spaces below in a short letter.

Reference initials show the letter writer's initials in capital letters, followed by a slash mark (or colon), and then the initials of the person typing the letter in lowercase letters, as shown in Figure 4-10. When the writer is also the person typing the letter, no initials are needed.

Enclosure notations indicate that the writer is sending material along with the letter (an invoice, an article, and so on). You should mention the enclosure in the body of the letter. Enclosure notations may take several forms:

- ▶ Enclosure: Final Safety Report

- ▶ Enclosures (2)
- ▶ Enc. or Encs.

Copy notation ("cc:") tells the reader that a copy of the letter is being sent to the named recipient(s) (see Figure 4-10). Use a blind-copy notation ("bcc:") when you do not want the addressee to know that a copy is being sent to someone else. A blind-copy notation appears only on the copy, not on the original ("bcc: Dr. Brenda Shelton"). See the Ethics Note in e-mail (Tab 2) on page 48.

Continuing Pages

If a letter requires a second page (or, in rare cases, more), always carry at least two lines of the body text over to that page. Use plain (nonletterhead) paper of quality equivalent to that of the letterhead stationery for the second page. It should have a header with the recipient's name, the page number, and the date. Using your word-processor heading function, place the header information in the upper left-hand corner or across the page, as shown in Figure 4-11.

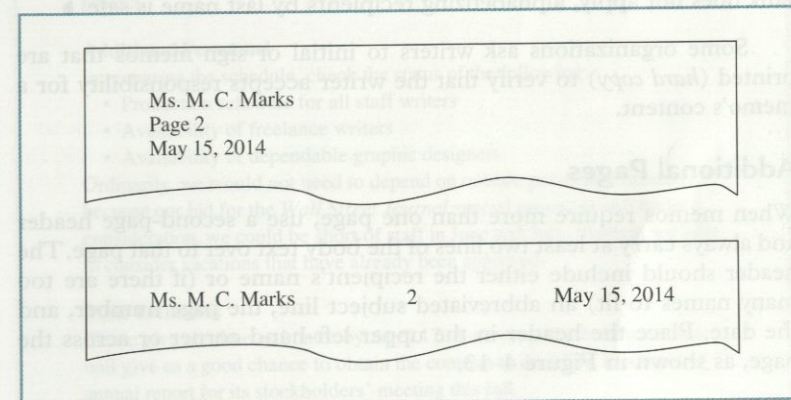


FIGURE 4-11. Alternative Headers for the Second Page of a Letter

memos

Memos are used within organizations for routine correspondence, short reports, proposals, and other internal documents. Memos use a standard form (*To:*, *From:*, *Date:*, *Subject:*) whether sent on paper or attached to an e-mail (Tab 2).

Even for organizations where e-mail messages have largely taken the function of memos, a printed or an attached memo with organizational letterhead can communicate with formality and authority in addition to offering the full range of word-processing features. Paper memos are also useful in manufacturing and service industries, as well as in other businesses where employees do not have easy access to e-mail. For a discussion of writing strategies for memos, see [correspondence](#). See also [selecting the medium](#) (Tab 2).

Memo Format

The memo shown in Figure 4-12 illustrates a typical memo format. As this example illustrates, the use of [headings](#) (Tab 7) and [lists](#) (Tab 7) foster clarity by providing [emphasis](#) (Tab 10) and highlighting organization. See also [letters](#). For a discussion of subject lines, see pages 120-121.

► **PROFESSIONALISM NOTE** As with e-mail, be alert to the practices of addressing and distributing memos in your organization. Consider who should receive or needs to be copied on a memo and in what order—senior managers, for example, take precedence over junior managers. If rank does not apply, alphabetizing recipients by last name is safe. ►

Some organizations ask writers to initial or sign memos that are printed (*hard copy*) to verify that the writer accepts responsibility for a memo's content.

Additional Pages

When memos require more than one page, use a second-page header and always carry at least two lines of the body text over to that page. The header should include either the recipient's name or (if there are too many names to fit) an abbreviated subject line, the page number, and the date. Place the header in the upper left-hand corner or across the page, as shown in Figure 4-13.

WEB LINK	Writing Memos
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For links to articles about when to write memos and tips for following organization protocol, visit bedfordstmartins.com/bwc and explore the Web Links at the Student Site.

Professional Publishing Services

MEMORANDUM

TO: Barbara Smith, Publications Manager
 FROM: Hannah Kaufman, Vice President
 DATE: April 11, 2014
 SUBJECT: Schedule for ACM Electronics Brochures

ACM Electronics has asked us to prepare a comprehensive set of brochures for its Milwaukee office by August 11, 2014. We have worked with similar firms in the past, so this job should be relatively easy to prepare. I estimate that the job will take nearly two months. Ted Harris has requested time and cost estimates for the project. Fred Moore in production will prepare the cost estimates, and I would like you to prepare a tentative schedule for the project.

Additional Personnel

In preparing the schedule, check the status of the following:

- Production schedule for all staff writers
- Availability of freelance writers
- Availability of dependable graphic designers

Ordinarily, we would not need to depend on outside personnel; however, because our bid for the *Wall Street Journal* special project is still under consideration, we could be short of staff in June and July. Further, we have to consider vacations that have already been approved.

Time Estimates

Please give me time estimates by April 17. A successful job done on time will give us a good chance to obtain the contract to do ACM Electronics' annual report for its stockholders' meeting this fall.

I am mailing separately several brochures that may be helpful.

cc: Ted Harris, President
 Fred Moore, Production Editor

FIGURE 4-12. Typical Memo Format (Printed or Attached to E-mail)

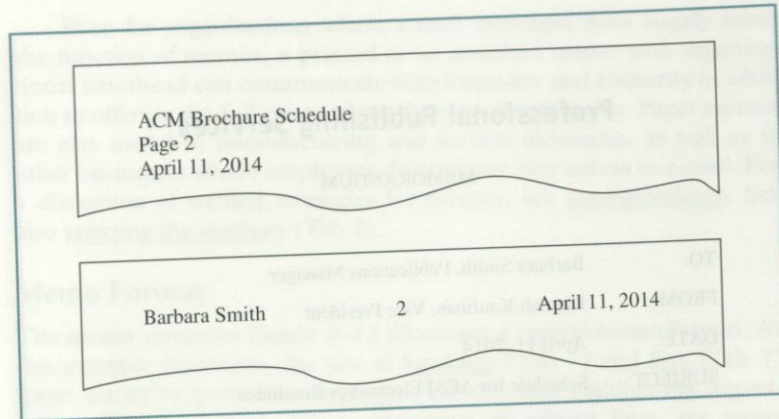


FIGURE 4-13. Alternative Headers for the Second Page of a Memo

refusals

A refusal delivers a negative message (or bad news) in the form of a **letter**, a **memo**, or an **e-mail** (Tab 2). The ideal refusal says “no” in such a way that you not only avoid antagonizing your reader but also maintain goodwill. See also **audience** (Tab 1).

The refusal in Figure 4-14 declines an invitation to speak at a meeting, and the stakes for the writer are relatively low; however, the writer wishes to acknowledge the honor of being asked.

When the stakes are high, you must convince your reader that the bad news is *based on reasons that are logical or at least understandable* (see also **correspondence**). Stating a negative message in your opening may cause readers to react too quickly and dismiss your explanation. The following pattern, used in Figure 4-15, is an effective way to handle this problem:

1. **Context.** In the opening, introduce the subject, but do not provide irrelevant information or mislead the reader that good news may follow.
2. **Explanation.** Review the facts or details that lead logically to the bad news, trying to see things from your reader’s point of view.
3. **Bad news.** State your refusal or negative message, based on the facts, concisely and without apology.
4. **Goodwill.** In the closing, establish or reestablish a positive relationship by providing an alternative if possible, assure the reader of your high opinion of his or her product or service, offer a friendly remark, or simply wish the reader success.

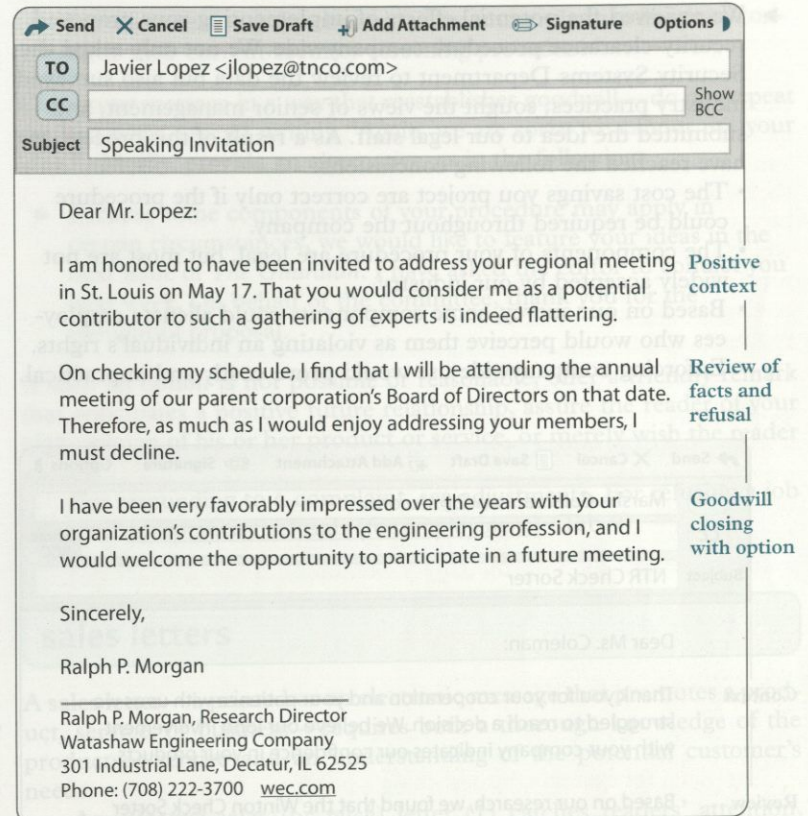


FIGURE 4-14. Refusal with Low Stakes

Your opening should provide an appropriate context and establish a professional **tone** (Tab 10) by, for example, expressing appreciation for a reader’s time, effort, or interest.

- ▶ The Screening Procedures Committee appreciates the time and effort you spent on your proposal for a new security-clearance procedure.

Next, review the circumstances of the situation sympathetically by placing yourself in the reader’s position. Clearly detail the reasons you cannot do what the reader wants—even though you have not yet said you cannot do it. A good explanation should ideally detail the reasons for your refusal so thoroughly that the reader will accept the negative message as a logical conclusion, as shown in the following example.

136 refusals

- ▶ We reviewed the potential effects of implementing your proposed security-clearance procedure companywide. We not only asked the Security Systems Department to review the data but also surveyed industry practices, sought the views of senior management, and submitted the idea to our legal staff. As a result of this process, we have reached the following conclusions:
 - The cost savings you project are correct only if the procedure could be required throughout the company.
 - The components of your procedure are legal, but most are not widely accepted by our industry.
 - Based on our survey, some components could alienate employees who would perceive them as violating an individual's rights.
 - Enforcing companywide use would prove costly and impractical.

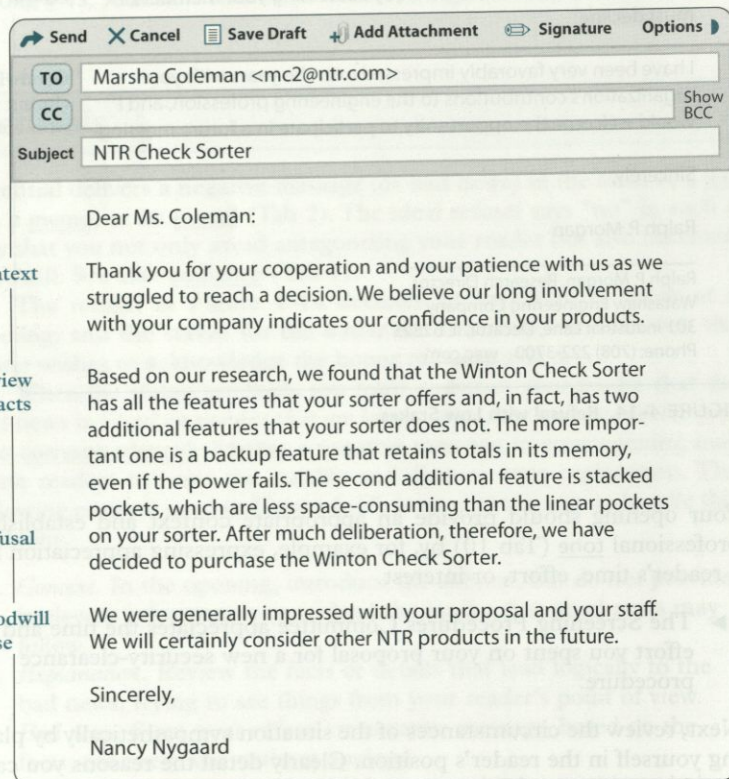


FIGURE 4-15. Refusal with High Stakes

Do not belabor the negative message—state your refusal quickly, clearly, and as positively as possible.

- ▶ For those reasons, the committee recommends that divisions continue their current security-screening procedures.

Close your message in a way that reestablishes goodwill—do not repeat the bad news. (Avoid writing “Again, we are sorry we cannot use your idea.”) Ideally, provide an alternative, as in the following:

- ▶ Because some components of your procedure may apply in certain circumstances, we would like to feature your ideas in the next issue of *The Guardian*. I have asked the editor to contact you next week. On behalf of the committee, thank you for the thoughtful proposal.

If such an option is not possible or reasonable, offer a friendly remark that anticipates a positive future relationship, assure the reader of your high opinion of his or her product or service, or merely wish the reader success.

For responding to a complaint, see [adjustments](#). For refusing a job offer, see [acceptance / refusals \(for employment\)](#) (Tab 9).

sales letters

A sales letter—a printed or an electronic message that promotes a product, service, or business—requires both a thorough knowledge of the product or service and an understanding of the potential customer's needs.

An effective sales (or *pitch*) letter (1) catches readers' attention, (2) engages their interest, (3) convinces them that your product or service will fulfill a need or desire, and (4) confidently asks them to take the course of action you suggest. See also [correspondence](#), [persuasion](#) (Tab 1), [promotional writing](#) (Tab 1), and [tone](#) (Tab 10).

Your first task in writing a sales letter is to determine to whom your message should be sent. One good source of names is a list of your customers; people who have at some time purchased a product or service from you may do so again. Other sources are lists of people who may be interested in similar products or services. Companies that specialize in marketing techniques compile such lists from the membership rolls of professional associations, lists of trade-show attendees, and the like. Because outside lists may be expensive, select them with care.

Once you determine who is to receive your sales letter, learn as much as you can about your readers so that you can effectively tell them how your product or service will satisfy their needs. Knowledge of your [audience](#) (Tab 1)—their gender, age, vocation, geographic location, educational level, financial status, and interests—will help determine your approach.

Analyze your product or service carefully to determine your strongest psychological sales points. Psychological selling involves stressing a product's benefits, which may be intangible, rather than its physical features. Select the most important psychological selling point about your product or service and build your sales message around it. Show how your product or service will make your readers' jobs easier, increase their status, make their personal lives more pleasant, and so on. Show how your product or service can satisfy your readers' needs or desires, which you identified in your opening. Then describe the physical features of your product in terms of their benefit to your readers. Help your readers with photos and Web links to imagine themselves using your product or service—and enjoying the benefits of doing so. See also “you” viewpoint (Tab 10).

❖ **ETHICS NOTE** Be certain that any claim you make in a sales message is valid. To claim that a product is safe guarantees its absolute safety; therefore, say that the product is safe “provided that normal safety precautions are taken.” Further, while you can highlight differences, do not exaggerate or speak negatively about a competitor. For further ethical and legal guidelines, visit the Direct Marketing Association Web site at www.dmaresponsibility.org. See also ethics in writing (Tab 1). ❖

Writer's Checklist: Writing Sales Letters

- ✓ Attract your readers' attention and arouse their interest in the opening, for example, by describing a product's feature that would appeal strongly to their needs. See also introductions (Tab 1).
- ✓ Convince readers that your product or service is everything you say it is through case histories, free-trial use, money-back guarantee, or testimonials and endorsements.*
- ✓ Suggest ways readers can make immediate use of the product or service. Include a brochure or a Web link with photos or videos.
- ✓ Minimize the negative effect price can have on readers.
 - Mention the price along with a reminder of the benefits of the product.
 - State the price in terms of units rather than sets (\$20 per item, not \$600 per set).
 - Identify the daily, monthly, or even yearly cost based on the estimated life of the product.

*For detailed advice, see the Federal Trade Commission Advertising Guidance Web site at www.ftc.gov/bcp/guides.shtm, and explore the section on endorsements and testimonials.

Writer's Checklist: Writing Sales Letters (continued)

- Suggest a series of payments rather than one total payment.
- Compare the cost of your product with that of something readers accept readily. (“This entire package costs no more than a dinner and a concert.”)
- ✓ Make it easy and worthwhile for customers to respond: Include a discount coupon, instructions for phone-in orders, information about free delivery, or a Web address or link where customers can view special discounts and order online.
- ✓ Include links to social media (Tab 2) and invite readers to become part of the conversation and community surrounding the product, service, or brand. Doing so also fosters the organization's Web presence.

WEB LINK	Sales-Letter Resources
For links to advice on writing sales letters as well as samples, visit bedfordstmartins.com/bwc and explore the Web Links at the Student Site.	