

- Focus on areas of agreement with an unreceptive audience.
- If your audience is unreceptive, advance your strongest arguments first.

## Applying Your Skills

1. Based on the suggestions provided on page 344, write a word picture—a vivid, colorful description that appeals to the senses—for one of the following scenes:
  - Your first day on a new job.
  - A difficult situation you faced at work
  - The implication of enduring no health insurance for all employees
  - Your work team receiving an award
2. Identify the logical fallacy in each of the following arguments:
  - We must raise taxes to finance the construction of new schools in our community. Otherwise, we will have to close the schools because our students won't be able to pass the state-required tests.
  - Everybody knows you can't find a decent job in our small town.
  - My dentist recommends we vote in favor of the proposition to reduce immigration so you should vote for it too.
  - The reason our children don't do well in math and science is because the stock market went down 300 points last week.
  - Sarah grew up in a state that spends less money on education than any state in the country; she could not possibly have any useful ideas about how to improve our children's test scores on standardized tests.
3. Select a product that you like and use. Based upon the steps of designing an effective sales presentation presented on pages 348–352, design a sales message imagining that you are selling the product to someone who is similar to you in age, interests, and experiences. Next, select a person who is considerably different from you, and redesign your sales presentation for him or her.
4. Prepare a short toast or no more than three or four sentences for one of the following occasions:
  - A business dinner with clients visiting from Russia.
  - A retirement party for one of your coworkers.
  - A party to celebrate your company reaching a sales goal.
  - A dinner hosted by a colleague of yours to celebrate that she and her spouse recently adopted a child.

# 14

## Writing for Business



### chapter outline

- Developing Business Writing Skills 359
- Using Technology and Email 366
- Writing Business Letters 371
- Writing Business Documents 374

#### After reading this chapter, you should be able to

- Describe different methods for organizing a business document.
- Describe business writing style and explain what is meant by tone and unbiased messages.
- Describe ways to prepare clear written messages.
- List and discuss three strategies for appropriate use of technology in business writing.
- Identify and apply the strategies for effective use of email.
- Define business correspondence and give four examples of common business correspondence.
- Identify the elements of an interoffice memo.
- Differentiate between progress reports, activity reports, and formal reports.

The quote on this page from newspaper legend Joseph Pulitzer, the father of writing's famous Pulitzer Prize, sums up the essence of good and powerful writing in one thirty-four-word statement. It's one of the great writing quotes of all time and focuses on what have often been called the "ABC's of writing" (accuracy, brevity, and clarity). When Pulitzer took over the struggling *New York World* in 1883, the world was a vastly different place.<sup>1</sup> He most likely couldn't have envisioned today's digital media and our ever-increasing reliance on technology to assist us in our writing. However, the value of his statement, and the value of good clear writing, has never changed. In today's world of 140-character Twitter posts and text messages full of abbreviations, it remains extremely important to focus on developing effective writing skills. In our current economy, with more job seekers than positions available, honing writing skills may be the one thing that puts a prospective hire over the top.

### leading questions

1. Why is Pulitzer's quote timeless? Why are writing skills vital to the twenty-first-century leader?
2. What about your own writing skills? Can you write a properly formatted business letter? An accurate and clear email message? Do you know the elements of an office memo?
3. Why are leaders concerned with the lack of writing skills in the new workforce? What does that mean in an increasingly competitive job market?

Leaders must know how to write in an effective manner. The lack of adequate writing skills among U.S. businesspeople is well-documented.<sup>2</sup> A study published in *Management Review* noted that poor writing skills among business leaders were putting companies at risk.<sup>3</sup> Executives have identified a lack of writing skills among job candidates interviewing for jobs. The study found that employers were beginning to place greater emphasis on writing and that job offers were going to those who can write. To address this concern, many employers have adopted policies requiring job candidates either to submit a brief written report as part of the screening process or to complete a writing exam as a part of the interview process.<sup>4</sup>

This chapter introduces you to some of the more important skills for business writing and the preparation of business reports. The chapter focuses primarily on Principle Two, *Effectively use and interpret verbal messages*. We examine the general rules and styles used for business documents and stress the benefits of clear and effective writing. We examine the customary format of business reports and the tone, content, and purpose of their component parts. Samples of various business documents are provided to give you the opportunity to develop and sharpen your written communication skills.

*"Put it before them briefly so they will read it, clearly so they will appreciate it, picturesquely so they will remember it, and above all, accurately so they will be guided by its light."*

— Joseph Pulitzer

## Developing Business Writing Skills

Certain business writing skills apply to a number of different types of business documents. Writers must be able to organize and develop paragraphs. They must be able to write in a style that reflects appropriate tone and use vocabulary that is adapted to the organization.

They must be able to write clearly using appropriate terminology while being concise. Finally, writers must be sure to use correct spelling and grammar. All these skills require planning and preparation before the writing process begins.

## Organizing and Developing Paragraphs

Maintaining a clear organizational pattern that flows naturally and is easy for the reader to understand will increase the effectiveness of your written communication. Making the document pleasing to look at and easy to read means “chunking” the information into visually distinct sections, using paragraphs.

**ORGANIZE THE DOCUMENT** Appropriately organizing a document is the first step a business writer can take to make sure the reader understands the message. There are several methods for organizing a document, depending on the type of document, its content, and the audience. The following paragraphs discuss some options for organizing a business document:

*Problem-solution* development begins with a description of a problem and moves on to discuss possible solutions or a proposed solution to the problem. A variation on this method is the *cause-and-effect* style of development, which outlines a cause and its possible effects. For example, if you were writing a report on employee turnover, you would start by describing the problem of turnover and its magnitude, then move on to discuss some possible ways to retain employees and minimize turnover. You would then outline the proposed best solution and offer reasons for selecting this solution.

The *chronological* or *sequential* organizational pattern begins with the first in a series of events or steps and moves on to the second, third, and so on. This organization pattern allows you to report on events or steps in the order in which they occurred or will occur. Using sequential development is helpful when writing a training manual, for example. When training someone in how to perform a skill, the steps must be enacted in a particular order. A team leader overseeing fifteen service agents at a customer service call center may need to develop a short training program on how to process a call. The training manual would likely include a step-by-step description of each behavior involved in processing a call effectively and successfully.

*Priority* development focuses on the most urgent or important information first, then moves on to less important or urgent information. This style would work well when developing an agenda for a business meeting. An agenda lists the items to be discussed in the meeting in the order they will be discussed. If, for example, an increase in customer complaints were an important priority item to discuss in a meeting, then that would be listed first on the agenda.

*General-to-specific* development is a format that allows you to begin with the big picture and move on to specific details. When preparing a sales proposal, for example, you may want to start by discussing the overall goals and move on toward the specifics of the product or service you are offering. Another way to use this method is to go from specific to general. For example, a restaurant chain marketing agent might describe a recent drop in sales at one store location and move on to outline the larger, global effects of this decline on the entire organization.<sup>5</sup>

Although this list of organizational patterns is not exhaustive, it can give you an idea of the various methods used to organize information. While organizing your document, you need to be aware of the reader and to select a method that best fits with the subject matter. An effective way to determine a method that works well for your message is to first develop an outline, or a basic skeleton of the information you want to write about. You can review the format to ensure that it fits with your message and makes sense to the reader before you fully develop the document.

**DEVELOP PARAGRAPHS** The paragraphs in your document are important tools that you can use to divide your information into logical sections. Paragraphs also provide visual breaks on the page, making the message easier to read. Three factors to consider when developing a paragraph are the topic sentence, length, and coherence.

The **topic sentence** of a paragraph is generally the first sentence, and it states the main idea. In other words, the topic sentence informs the reader about the content of the paragraph. The sentences that follow the topic sentence support the idea asserted in the topic sentence. For example, when writing in support of a proposed travel budget increase, you could start with the following sentence: “As a result of the rising cost of fuel, transportation costs have nearly tripled in the last quarter.” The sentences following the topic sentence in the paragraph describe and offer evidence of the increased cost.

The second factor to consider in developing a paragraph is length, which again depends on your subject matter, reader, and the type of document. A memo, for instance, may have short paragraphs. In a letter or report, making the paragraphs too short could result in an underdeveloped message and information that is not clear to the reader. Paragraphs that are too long are not visually appealing and can be difficult to read if they fail to chunk information into manageable sections for the reader.

The third factor to consider when constructing paragraphs is coherence. **Coherence** refers to unity created by common underlying concepts, logical organization, and clear, natural development of the content.<sup>6</sup> Coherence can be created, for example, by writing in one tense or from one point of view. For example, suppose a manager writes the following in a memo: “The employee training sessions *are being conducted* on Wednesday afternoons. We *trained* six employees in these sessions.” The switch from present tense in the first sentence to past tense in the second sentence undermines coherence and makes little sense. Transitions can be used within and between paragraphs to help the paragraphs flow smoothly. Also, to make the information easier to read, headers can be used when separating paragraphs or main ideas. Headers also help to break the page up into visually distinct and easy-to-read sections.

## Using Appropriate Writing Style

When writing for business, consider both style and clarity. **Writing style** refers to the tone, language, voice, and overall viewpoint of the sentences. Compared to other forms of writing, business writing style is generally more precise, brief, and direct. Also, the style of business writing has evolved from a previously formal and elaborate style to one that is more personal, although this may vary depending on the organization. The business writer also needs to take into consideration the tone and bias of the language used.

**USE APPROPRIATE TONE AND VOCABULARY** Whatever the type of document they are preparing, writers should consider the tone of their message. **Tone** refers to the attitude of the writer toward both the reader and the subject matter. In many ways the tone of a written document has an effect similar to that of the tone of voice in face-to-face communication—the tone of a document (courteous, brusque, demanding, deferential, or friendly) complements the words used in the document. The following questions will help you to determine the appropriate tone for your message.

- Why am I writing this document?
- Who am I writing to and what do I want them to understand?
- What kind of tone will complement and reinforce my written message?

Fortunately, you can use the same tone for most business messages. Remember that the main goal is to adapt your message to your reader. Using difficult vocabulary or phrases that demonstrate a lack of confidence, such as “I think you will find our product to be useful and beneficial to your organization,” may not effectively communicate to your reader that you are convinced of the benefits of your product. Follow these general guidelines when considering what kind of tone to use in your letters and how to present information in that tone:

- Be confident.
- Be courteous and sincere.
- Adapt to the reader by stressing benefits.
- Write at an appropriate level of difficulty.

## terms & definitions

**Topic sentence** generally, the first sentence of a paragraph that states the main idea.

**Coherence** unity in writing created by common underlying concepts, logical organization, and clear, natural development of the content.

**Writing style** the tone, language, voice, and overall viewpoint of the sentences in a piece of writing.

**Tone** the attitude of the writer toward both the reader and the subject matter that is communicated in a written document.

**USE UNBIASED LANGUAGE** One of the ways you can make your business writing effective is to avoid biased messages. **Biased messages** include words and expressions that offend because they make inappropriate assumptions or repeat stereotypes about gender, ethnicity, physical or mental disability, age, or sexual orientation. Although some people dismiss the notion that they should use unbiased messages as mere “political correctness,” in reality, it is what most parents have been teaching their children for years—to be considerate of others. Following are several ways to use unbiased verbal messages:

Avoid use of the generic *he*. Generic verbal messages include words that may apply to only one sex, race, or other group, as though that group represents everyone. For example, using the word *he* to include both men and women is no longer appropriate in the diverse professional workplace. Some people argue that the use of *he* automatically includes both men and women. But research does not confirm this widely held belief.<sup>7</sup> The use of *he* is exclusionary; it leaves women out.<sup>8</sup> Using *he/she* is awkward in many situations; it’s best to use plural pronouns. Rather than writing “A manager is effective because *he* is a competent communicator,” write “Managers are effective because *they* are competent communicators.”

Contrary to popular belief, when writers use the generic *man* to refer to both men and women (as in the word *mailman*), women feel excluded.<sup>9</sup> In fact, research suggests that people usually visualize men when they hear that label. Additionally, when job titles end in “man,” individuals in those positions are assumed to have stereotypically masculine personality traits. Rather than using the generic word *man*, try using the following to make your business writing style more effective and appropriate:

| Instead of . . . | Use . . .            |
|------------------|----------------------|
| Chairman         | Chair                |
| Freshman         | First-year student   |
| Fireman          | Firefighter          |
| Salesman         | Sales representative |
| Mailman          | Mail carrier         |

*Parallel* verbal phrases use language and phrases that are symmetrical. Nonparallel verbal messages treat groups differently and therefore are perceived negatively, as biased. Here are a few examples to clarify the difference between parallel and nonparallel verbal messages:

| Nonparallel Phrases | Parallel Phrases     |
|---------------------|----------------------|
| Ladies and men      | Ladies and gentlemen |
| Men and girls       | Men and women        |
| Boys and women      | Boys and girls       |

## terms & definitions

**Biased messages** messages that include words or expressions that offend because they make inappropriate assumptions or repeat stereotypes about gender, ethnicity, physical or mental disability, age, or sexual orientation.

**Clarity** the specificity of a message and how easily the reader can comprehend the information.

## Writing with Clarity

Have you ever tried to read something, and you couldn’t understand it? Maybe the words were all spelled correctly and easy to read, but the message was still unclear? **Clarity** refers to the specificity of a message and how easily the reader can comprehend the information. Many of the ideas discussed in this section were also discussed in Chapter 3, which examined how to use and interpret verbal messages. However, Chapter 3 discussed clarity as it pertains to oral, or spoken, messages. In this section, we discuss clarity as it relates to the written word.

When writing for business, as opposed to other forms of writing (such as creative writing), clarity of message and thought is very important. Ambiguous messages or unclear sentences can prevent your writing from communicating to the reader. A clear paragraph is coherent; it has a logical sequence and smooth transitions between the sentences.

Another consideration in achieving clarity is the choice of words. Abstract phrases, such as “use a bright color palette,” will not communicate as much or as clearly as concrete phrases, such as “use bright oranges, yellows, and reds.” The business writer should also be cautious about jargon. As defined in Chapter 3, **jargon** is language used by a particular group, profession, or culture that may not be understood or used by other people. Jargon is common in the workplace, and it tends to become overused.<sup>10</sup> If you’ve ever worked as a restaurant server, for example, you probably recognize the phrase “in the weeds,” which you have used anytime you are so overwhelmed with customers that you feel like you can’t catch up. But for those who haven’t worked in the food industry, that statement holds little meaning. Phrases such as “Let’s dialogue” (instead of “Let’s discuss this”) can become clichéd and can seem inappropriate to a reader outside of the organization. Jargon can be effective if readers are familiar with the terms. When writing for an outside audience, however, avoid jargon.

A final consideration when writing for clarity is to be concise. **Concise writing** avoids unnecessary words and phrases but does not sacrifice clarity or necessary detail. A report need not be brief to be concise, and making something shorter is not appropriate if clarity is sacrificed. Here are some suggestions for writing concisely.<sup>11</sup>

**USE SUBORDINATION** Instead of writing “We received the sales report this afternoon. It was five pages. The report clearly illustrated a drop in sales marketwide,” subordinate, using conjunctions to combine the ideas from these sentences to make one coherent, concise sentence: “This afternoon we received the five-page sales report, which clearly illustrates a marketwide drop in sales.”

**AVOID REDUNDANCY** Even if you are not repeating whole phrases and sentences, a report can still be redundant. Eliminate qualifying terms that are not necessary, such as “first and foremost” or “basic and fundamental.”

**DO NOT OVERUSE INTENSIFIERS** Sometimes intensifiers are relevant and help convey the importance of an idea. However, their overuse can become redundant and cause your writing to lose some of its clarity. It is not necessary to write “The report was perfectly clear and completely accurate.” Instead, just say “The report was clear and accurate.” Although intensifiers are sometimes appropriate, take caution to avoid overusing them because they lose their intensity.

**AVOID TELEGRAPHIC LANGUAGE** One pitfall in attempting to write concisely is the tendency to oversimplify. **Telegraphic style** is a writing style that condenses a message by eliminating articles, pronouns, conjunctions, and transitions. Although telegraphic style may make a document brief, the document may not necessarily remain clear. Consider the following examples:

Telegraphic style: Per May 5 memo, meeting agenda attached. Supervisor wants report by Houston office. Meeting as soon as report received. August almost full, please advise to set date.

Clear message: As I mentioned in my May 5 memo, I have attached the next meeting agenda. The supervisor wants the report to be completed by the Houston office. As soon as we get the report, we can schedule a meeting. Our August calendar is almost full, so please suggest a date soon.

## Using Correct Spelling and Grammar

Readers often view how you communicate in written messages as a measure of your effectiveness.<sup>12</sup> Paying close attention to spelling and grammar will help you develop credibility with your readers. A document that contains spelling or grammatical errors can be difficult to read and may fail to communicate the message completely. Mistakes generally reflect poorly on the writer and often on the organization as well.

## terms & definitions

**Jargon** language used by a particular group, profession, or culture that may not be understood or used by other people.

**Concise writing** writing that avoids unnecessary words and phrases.

**Telegraphic style** a writing style that condenses the message by eliminating articles, pronouns, conjunctions, and transitions.

The spell-check tool on most word-processing programs is a good place to start when you want to identify spelling errors. Spell-checkers are not foolproof, however, and relying solely on a spell-check tool may not give effective results.<sup>13</sup> It is always a good idea to go over a hard copy of any document yourself and then pass it on to a friend or a colleague to proofread before delivering it to readers. Reread your notes to confirm the spelling of names and places; a proofreader often cannot catch such mistakes. For example, Mr. Schmitt; may not appreciate receiving a letter addressed to Mr. Schmidt; but because the latter is a more common spelling, it will likely not be identified as an error by a spell-check program or a proofreader. Examine the following sentences to see if you can identify the mistakes that a spell-checker would miss.<sup>14</sup>

- Of all the perspective employees we have interviewed, you have the most impressive resume and work experience. (*prospective*)
- A background in education training has proven to be a real compliment to my experience as a trainer. (*complement*)
- . . . identified potential roadblocks to ensure that project operations preceded smoothly. (*proceeded*)
- . . . organized and lead a fifteen-member customer service team who processed all the calls in the customer retention department. (*led*)

## Communication Skills FOR A Digital Age

### Growing up in a Digital World

According to a recent report in the *New York Times*,<sup>15</sup> the effects of growing up in an increasingly digital world can be seen in the new generation of young people, and they are not all good. Researchers have discovered students have less and less ability to focus on one activity, read longer prose, or even comprehend longer messages that require extended periods of attention. In fact, the constant stimulation from video games, phone calls, text messages, and social media updates (all often accessed from one or two mobile devices) has lessened their ability to concentrate at all. In addition, the interactive nature of these programs is often preferred to homework, studying, and reading books, none of which provide the reward of immediate feedback.

However, the same generation can often run laps around older generations in their ability to make full use of digital media and new technologies. New graduates may be experts at using new media, but has it harmed their ability to read and write accurate, clear material? With cell phone keyboards that encourage responses such as “ill text u after the mtg,” future business professionals need to know when and how to “turn off” the shorthand. Effective development of basic writing skills is still necessary to present a positive, competent image.

### Applying Your Skills

Take stock of your own social media use. Do you find yourself composing more and more shorthand abbreviated messages? Do you read these types of messages more every day? How has that affected your own ability to focus? When was the last

time you read a book? (If you are reading this text, you are off to a good start.)

Here are some keys to developing writing skills in an age of informal communication:

- *Learn proper grammar.* We often rely on word-processing programs to “tell” us when there is a grammatical problem in our writing. And many writers have grown so accustomed to the “little green squiggly line” under their sentences that they ignore the grammatical problems altogether.
- *Take time to read longer prose.* Read textbooks, read long-form journalism, read the articles in a magazine, and read works of fiction. Just take the time to read. Our vocabulary increases when we read often, but it must be more than “omg.”
- *Take care with your spelling.* Shorthand has become common and can be used effectively in the workplace. But Twitter users, for example, know how misspellings are commonplace because of the need to condense a message to a limited number of characters. Although appropriate for Twitter, remember the accurate spelling of words when crafting a more formal document.
- *Give your brain some downtime.* Take away or turn off the new media barrage. New imaging studies have found that periods of rest for the brain are vital to allowing it to make connections, process new information, commit that information to longer term memory, and even develop our sense of self.<sup>16</sup>

All the words in these four sentences are spelled correctly and would not be caught by a spell-checker. However, the indicated words are not appropriate for the context. Although helpful, a spell-check program is no replacement for editing and proofreading.

Equally important in business writing is proper usage of grammar. **Grammar** refers to the functions of words and the way they work together to form coherent language. Standard English grammatical rules apply in business writing, and being familiar with these rules will help in the writing process. Many word-processing programs have grammar check tools, but be aware that these programs may not correct all mistakes. Once again, proofreading a hard copy of your document for grammatical errors is always a good idea.

The skills discussed in this section apply to all forms of business writing. They help make your writing clear, precise, effective, logical, and accurate. The first skill is to clearly develop and organize your document, using structure and clear paragraphs. The second skill is to use the appropriate writing style for your document, audience, and subject. A third skill is to write clearly, using concise, effective messages to enhance communication. The fourth skill we discussed is to make sure your spelling and grammar are correct, which can develop your credibility with the reader and ensure you have effectively communicated your message. Use these skills when developing any business document.

### terms & definitions

**Grammar** the study of the functions of words and the way they work together to form coherent language.

## RECAP

### Skills for Effective Business Writing

| Skills                           | Strategies                                                 | Examples                                                                                                                                                                                    |
|----------------------------------|------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Organize the document            | Decide on an organizational structure or format.           | A persuasive sales proposal might use a problem-solution format.                                                                                                                            |
|                                  | Use paragraphs with topic sentences.                       | Start a new paragraph with a new topic sentence for new ideas, to highlight the main ideas and make the document easy to read.                                                              |
|                                  | Develop an outline                                         | Lay out your main ideas first to see how they fit together. Then support with subpoints where necessary.                                                                                    |
| Use appropriate style            | Select appropriate tone and vocabulary                     | "Hi, how are you doing, Sarah?" works well for an informal greeting, whereas "Good afternoon, Dr. Strong," strikes a more formal tone.                                                      |
|                                  | Avoid biased language.                                     | Say <i>police officer</i> instead of <i>policeman</i> , or cop.                                                                                                                             |
| Write with clarity               | Be concise.                                                | The statement "Please come to the meeting which will be today at 5 o'clock in the afternoon." is too wordy. A more concise statement would be "Please come to the meeting at 5 P.M. today." |
|                                  | Avoid jargon.                                              | Don't use words or phrases that only certain people might understand, particularly when composing for an audience outside the organization.                                                 |
| Use correct spelling and grammar | Use more than word-processing programs' spell-check tools. | Have a friend, family member, or coworker assist by proofreading; read the document aloud; and double-check the spelling of proper nouns.                                                   |

## Using Technology and Email

As the workplace becomes increasingly media saturated, we cannot ignore the importance of remaining professional and effective in our use of technologically mediated communication. Business leaders report an increasing pressure from new graduates to develop or maintain a wired workplace, with easy Wi-Fi access that allows users to integrate their many digital devices seamlessly.<sup>17</sup> Although technology can expand efficiency, leaders must be cautious that mediated communication doesn't result in messages not being expressed clearly. Effective, appropriate use of technology and email can enhance a group's image both within and outside the organization.

### terms & definitions

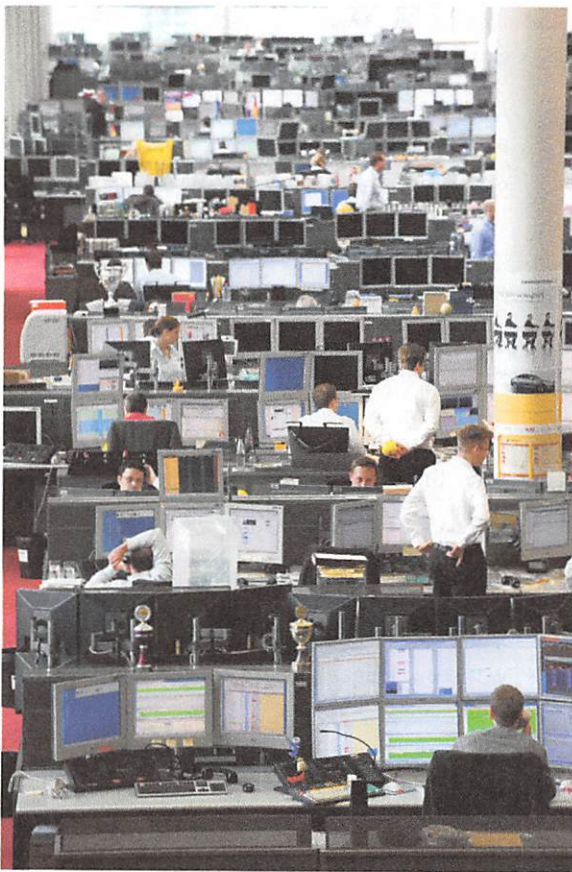
**Media richness** the degree to which a channel of communication offers the possibility of immediate feedback; provides both verbal and nonverbal cues; allows the use of natural, informal language; and customizes messages to recipients.

### Learning to Use Technology Thoughtfully

Although perfecting business writing skills is challenging, what might be more challenging for new leaders is learning when and how to use technology to communicate. Many times the question that confronts a leader is, "Should I communicate to others in writing or should I communicate in person?" Leaders need to be aware of when writing a document is more appropriate and when speaking in person is preferable. If a leader decides to communicate through writing, then which format is best? Is an email appropriate, or should a letter be sent? If a leader decides to communicate orally, is a voice-mail message appropriate, or should he or she schedule a face-to-face meeting? These questions are important, especially because *Business Week* writer Michael Mandel reported that 25 percent of 7,800 leaders who were surveyed reported that voice mail, email, and meetings were completely ineffective in the workplace; nearly 40 percent of the leaders spent a half to full day per week on communication activities that were ineffective.<sup>18</sup>

To use technology effectively when writing and speaking, it's important to understand what communication researchers refer to as **media richness**, or how closely a technology simulates face-to-face communication.<sup>19</sup> As we noted in Chapter 9, according to media richness theory, a method or channel of communication is rich if it offers the possibility of instant feedback; allows both verbal and nonverbal cues to be processed by senders and receivers; allows the use of natural, informal language rather than formal language; and customizes messages to individuals rather than communicating to a mass of people. Management and marketing researchers Robert Lengel and Richard Daft describe how the channel (face-to-face conversation, email, text message, or whatever it may be) influences how messages are received. Lengel and Daft assert that different media have different degrees of richness; some channels are rich, others are lean. For example, flyers or posters advertising a meeting are considered a lean medium because they convey messages using a single channel (the visual channel) and because readers of a poster have no interaction with the creator of the poster. In contrast, face-to-face meetings are considered a rich medium because they convey messages using multiple channels (sight, sound, smell, touch) and allow people to interact. Figure 14.1 illustrates the media richness continuum.<sup>20</sup>

As you can see from Figure 14.1, as the number of channels through which messages are conveyed increases, communication becomes more interactive and personal. As the number of channels decreases, communication becomes less interactive and more impersonal. The following section offers guidelines to help you become aware of media richness and how to apply this model in business and professional settings.



*The completely wired and media-saturated workplace increasingly demands effective, professional use of technology, as well as the ability to express oneself clearly.*

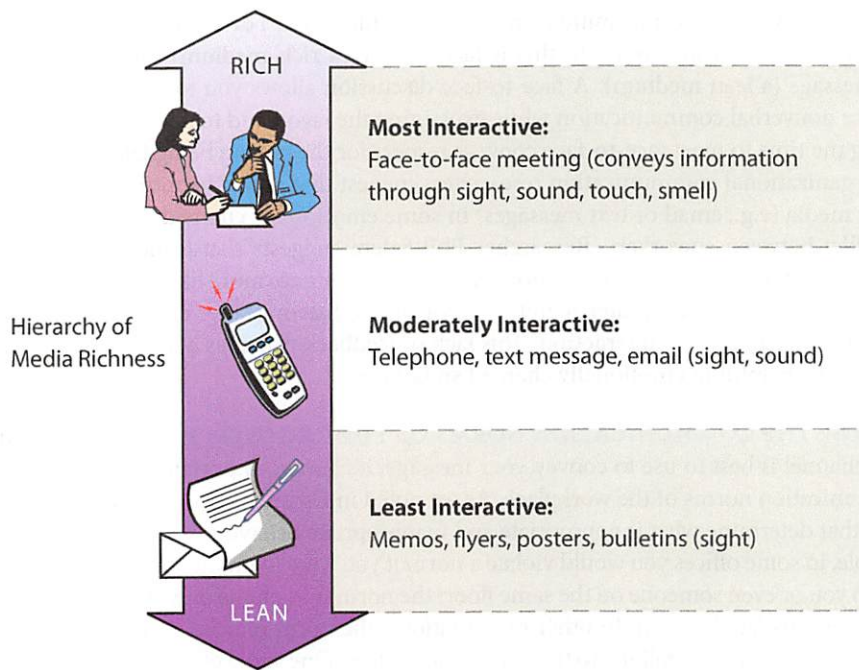


FIGURE 14.1 Media Richness Continuum

**CONSIDER THE QUALITIES OF THE MESSAGE** Messages have certain qualities that will help you decide which channels or media are most appropriate to use to convey them. If your message is routine—meaning that it is simple, straightforward, contains no surprises, and is task related—then lean media such as flyers, letters, and memos are probably most appropriate. If your message is nonroutine—meaning that it is complex, confusing, contains a surprise, or is time sensitive—then rich media such as face-to-face meetings or video or web conferences are probably better.<sup>21</sup> When information is complex and confusing, you want to make sure you receive immediate feedback from your team members so you can clarify and correct any misunderstandings.<sup>22</sup> A rich medium allows such feedback.

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**CONSIDER THE EMOTIONAL IMPACT OF THE MESSAGE** When a fabricated scandal resulted in the quick termination of U.S. Department of Agriculture (USDA) employee Shirley Sherrod in 2010, she was notified of her expected resignation through text message while she was driving to work.<sup>23</sup> The channel (text message) alone caused an uproar, showing a lack of respect for a longtime employee. As the USDA learned, sometimes text messages are not the most appropriate mode of communication. If you've ever been notified by a text message that you were fired, you know how important it is to match the communication channel to the emotional impact of the message. What hurt was not only the message, but also the way the message was delivered. Even less powerful messages can be destructive if communicated through text message alone, such as critical performance reviews. Although both sending and receiving emotionally sensitive information are difficult, the channel—



"Can't talk now. I'm in a seminar about improving communication with technology."

the way the message is transmitted—makes a big difference. For example, if you're laying someone off, the ideal way to do this is face-to-face (a rich medium) rather than with a text message (a lean medium). A face-to-face discussion allows you to effectively interpret and use nonverbal communication while explaining the layoff and to answer any questions. Taking the time to meet face-to-face conveys respect for the person being laid off.

Organizational communication researchers suggest that it may be more effective to use leaner media (e.g., email or text messages) in some emotionally charged situations, such as a conflict between coworkers. Researcher Phil Salem suggests that leaner media may be more effective in some conflict situations when individuals are more likely to say something out of anger that they may later regret.<sup>24</sup> According to Salem, leaner media don't allow for immediate feedback and interaction. This lack of feedback provides a "cooling-off" period that may be helpful in emotionally charged situations.

**FOLLOW THE COMMUNICATION NORMS OF THE ORGANIZATION** When deciding what channel is best to use to convey your message, it's always important to be aware of the communication norms of the workplace. As we noted in Chapter 9, **norms** are general standards that determine what is appropriate and inappropriate behavior in an organization. For example, in some offices you would violate a norm if you were to phone someone in the office next to you or even someone on the same floor; the norm is to phone only people who are not in your immediate location. In other organizations, the norm may be sending email rather than using the phone or talking to the person face to face. One study of over 150 senior executives at the nation's 1,000 largest companies found that only 13 percent of leaders used the telephone as their primary means of communication, which was down from 48 percent five years previously. Also, just 14 percent of the leaders reported relying on face-to-face meetings, compared with 24 percent five years before. Instead, email had become the most common channel for dialogue at work, according to 71 percent of the leaders surveyed.<sup>25</sup> This research data suggests that communication norms may be changing, moving away from rich communication media and toward more lean communication media. However, with the advent of smartphones and other new technologies, our continued use of lean media can be efficient timesavers. Regardless of the research data, it's important to carefully observe the communication norms in your office and work unit and follow the norms already established.

**USE MULTIPLE CHANNELS** Organizational communication researcher Keri Stephens recommends that leaders use multiple channels when communicating with employees and team members.<sup>26</sup> Stephens argues that employees are not tied to any one communication technology and that to be effective in your communication, it's important to communicate using a variety of channels. For example, if you're preparing to facilitate a meeting next week, you might do the following:

- Send out an email, voice mail, and a text message asking for team members' input on what they would like to discuss at the meeting.
- Send out a paper memo outlining the agenda for the meeting in addition to attaching the memo to an email message.
- Send a text message on the day of the meeting reminding team members of the meeting time and location.
- Communicate face-to-face at the meeting.

Stephens mentions that by using multiple channels to communicate with team members, you are more likely to reach more of your audience members than if you relied solely on a single technology.

## terms & definitions

**Norms** general standards within an organization that determine what is appropriate and inappropriate behavior.

## Using Email

Email messaging now exceeds telephoning as the dominant form of business communication.<sup>27</sup> Many people claim that handling their emails can consume half of their day. One *Wall Street Journal* report predicted that employees would soon spend three to four hours a day on email.<sup>28</sup> With the increased use of email as an accepted form of business communication,

some basic etiquette rules are being established to keep email usage both effective and professional. Here are some tips for composing professional email messages, either in the workplace or in an academic context:<sup>29</sup>

- *Be concise.* Keep messages brief and to the point. Correct writing doesn't have to be lengthy. Make your writing as concise as possible; it can be frustrating for a reader to have to wade through an email twice as long as needed.
- *Use proper letter case.* Letter case indicates whether words are written using capital (uppercase) letters or lowercase letters. Using all capital letters gives the impression you're shouting; using all lowercase letters gives the impression you're either whispering or lazy.
- *Use blind copy (BCC) and courtesy copy (CC) appropriately.* Use courtesy copy to keep others informed. Use blind copy only when you prefer to keep recipients from seeing who else received a copy of your email message. You would do this if your email involved issues of confidentiality or if the information in it might damage a relationship. For example, suppose you want to let your district manager know how you're handling an employee problem. You email the employee himself to notify him of your plan, and you send a blind copy of the email to the district manager. This way, the district manager knows the problem is being managed, but the employee doesn't know the district manager has been informed. If the problem employee was to know this, his relationship with the district manager might be compromised. Also use BCC when sending to a large distribution list, so recipients won't have to scroll through a long list of names to get to the message.
- *Use the subject line.* When sending a new email, always include the important and pertinent information in the subject line. The subject line can be anything relevant—an ID number, a claim number, a meeting date, a project name—or it can be a descriptive subject line that reveals to the reader the nature of your email. Sometimes to get an email out quickly, we ignore the subject line. This can be ineffective because it fails to let the recipient know the topic of your email. Also, a subject line assists in later filing or searching for your message.
- *Use correct grammar and punctuation.* The advent of smartphones and other text messaging devices has led to a decline in the formality of electronic communication. When sending email, use proper grammar and punctuation. Just because the channel is less formal does not mean the writing can be sloppy.

## Communication Ethics @ Work

### Social Media and the Blurring of Personal/Professional Boundaries

Smartphones, laptops, iPads, and other electronic devices all increase Internet access for many business professionals. If we bring these items to work, and use them to manage our online presence on social networks, we may be violating a workplace policy. Many companies discourage or even ban social media use at work, fearing that it can quickly become a distraction. In addition, more and more organizations are developing rules, guidelines, and policies regarding employee social media use, regardless of whether or not they are used in the workplace.<sup>30</sup>

For example, in 2009, the *Los Angeles Times* released their newly developed social media guidelines for employees.<sup>31</sup> They include a warning that although employees may try to keep their personal and professional identities separate online, they often merge together. Employees are warned not

to post anything online that might embarrass the *LA Times* or appear to compromise workers' ability to do their job. In addition, employees' choices of who to "friend" in social media forums are being regulated by their employer, to help maintain an impression of objectivity. For example, "friending" someone on one side of the debate means "friending" someone on the other side, to appear impartial.

As a student, take stock of your own online presence. Do you use a social media site, such as Twitter, LinkedIn, Facebook, or MySpace? You might expect a level of privacy related to these accounts, so how would you respond to an employer's request to limit or regulate your online identity? Do you think these organizations have a right to manage their employees' social network sites? Does an employee's presence on social networks reflect an image of the employer as well?

## Skills for Effective Use of Technology and Email

| Skill                       | Strategies                                    | Examples                                                                                                                                                                                                               |
|-----------------------------|-----------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Use technology thoughtfully | Consider the qualities of the message.        | A confusing or complex message is better communicated in a face-to-face manner. Routine messages such as meeting times or weekly sales numbers can benefit from a leaner medium.                                       |
|                             | Consider the emotional impact of the message. | Emotionally charged messages—such as bad news about missed promotions, layoffs, or termination—should be handled in a face-to-face conversation.                                                                       |
|                             | Follow the norms of the organization.         | If most people in your office prefer a face-to-face conversation instead of a phone call or email, then walk over and talk with them, instead of relying on technology.                                                |
|                             | Use multiple channels.                        | Send a memo, remind people in person, and post the meeting time on the office bulletin board.                                                                                                                          |
| Use email effectively       | Be concise.                                   | Use short, to-the-point statements in emails because they are typically read quickly.                                                                                                                                  |
|                             | Use proper letter case and punctuation.       | The statement “MR. GONZALEZ, WE MIGHT NEED TO SCHEDULE A MEETING FOR THIS AFTERNOON” appears to be yelling, whereas one that reads “mr. gonzalez we might need to schedule a meeting for this afternoon” looks sloppy. |
|                             | Use a subject line.                           | Include names and identification information if necessary, or at least identify the topic of your email.                                                                                                               |
|                             | Use CC and BCC appropriately.                 | Large distribution lists may be better handled with BCC, so the reader doesn’t have to scroll through a long list of recipients.                                                                                       |
|                             | Pay attention to grammar and spelling.        | Reading over your email aloud before sending it often helps you catch mistakes.                                                                                                                                        |

- *Consider the appropriateness of your content.* Employees have been fired for using email inappropriately (e.g., forwarding items with sexual or off-color content) or for personal use. Never put in an email message anything you wouldn’t put on a postcard. Remember that email can be forwarded, so unintended audiences may see what you’ve written.
- *Don’t use email as an excuse for not communicating through more appropriate channels of communication.* Don’t forget the value of face-to-face or voice-to-voice communication. Email communication isn’t appropriate for sending confusing or emotional messages. Don’t use email to avoid an uncomfortable situation or to cover up a mistake.

## Writing Business Letters

Business letters are standard communication formats that are important and common in the workplace. As a leader, you will likely need to communicate with those outside of your organization—for example, with clients or those in other organizations. Being able to apply the skills discussed earlier to business letters is important and valuable.

### Correspondence

**Correspondence** refers to business letters sent to customers, coworkers, superiors, and subordinates. Because business correspondence often is more personal than formal proposals and reports, it should generally be written in a conversational style. Suggestions for writing effective correspondence include the following.

**DEVELOP GOODWILL** **Goodwill** is a positive perception of the author on the part of the audience. A good way to build goodwill is to keep correspondence audience focused. Put simply, adapt to your reader. Rather than saying, “We need to see a receipt before we can process a return or exchange of the merchandise,” say, “You may receive a full refund or exchange of the merchandise if you mail or fax a receipt.” The two sentences say essentially the same thing, but the focus in the second sentence is on the needs of the customer. In this case you could build even more goodwill by sending an acknowledgment letter letting the person know the receipt arrived and thanking the person for being prompt.

**INCLUDE STANDARD ELEMENTS OF CORRESPONDENCE** Although the general appearance and format of correspondence may vary, following is a list of elements present in most business correspondence. Use this list as a guideline when deciding what to include in your business letter. Figure 14.2 illustrates a sample business letter.

- *Return address.* The return address contains the sender’s address and the date the letter was written. If the letter appears on letterhead that includes an address, a date is enough for the return address.
- *Inside address.* Include the name and address of the recipient of the letter before a salutation.
- *Salutation.* A salutation should address the recipient of the letter directly and appropriately. A letter intended to be social and friendly can have a comma after the salutation; a more formal letter should include a colon. Avoid “Dear Sir” unless you are certain the recipient is male. The overused “To Whom It May Concern” is too impersonal. Take the time to determine exactly to whom the letter should be addressed.
- *Body.* The body contains the content of the letter. It should be written in paragraph form. Including a non-task-related message at the beginning of the letter can help to build rapport, for example, “Thank you for expressing interest in exploring the employment options offered at our institution.” Then enter into the main message.
- *Closing.* The end of the letter should include a closing expression before your signature. This can be the common and effective “Sincerely,” “Cordially,” or something more personal such as “Best,” or “Respectfully yours.” The letter should include both a handwritten signature and a typed signature block. The block usually contains your name, as well as your title and the name of your organization (unless your letter appears on letterhead).

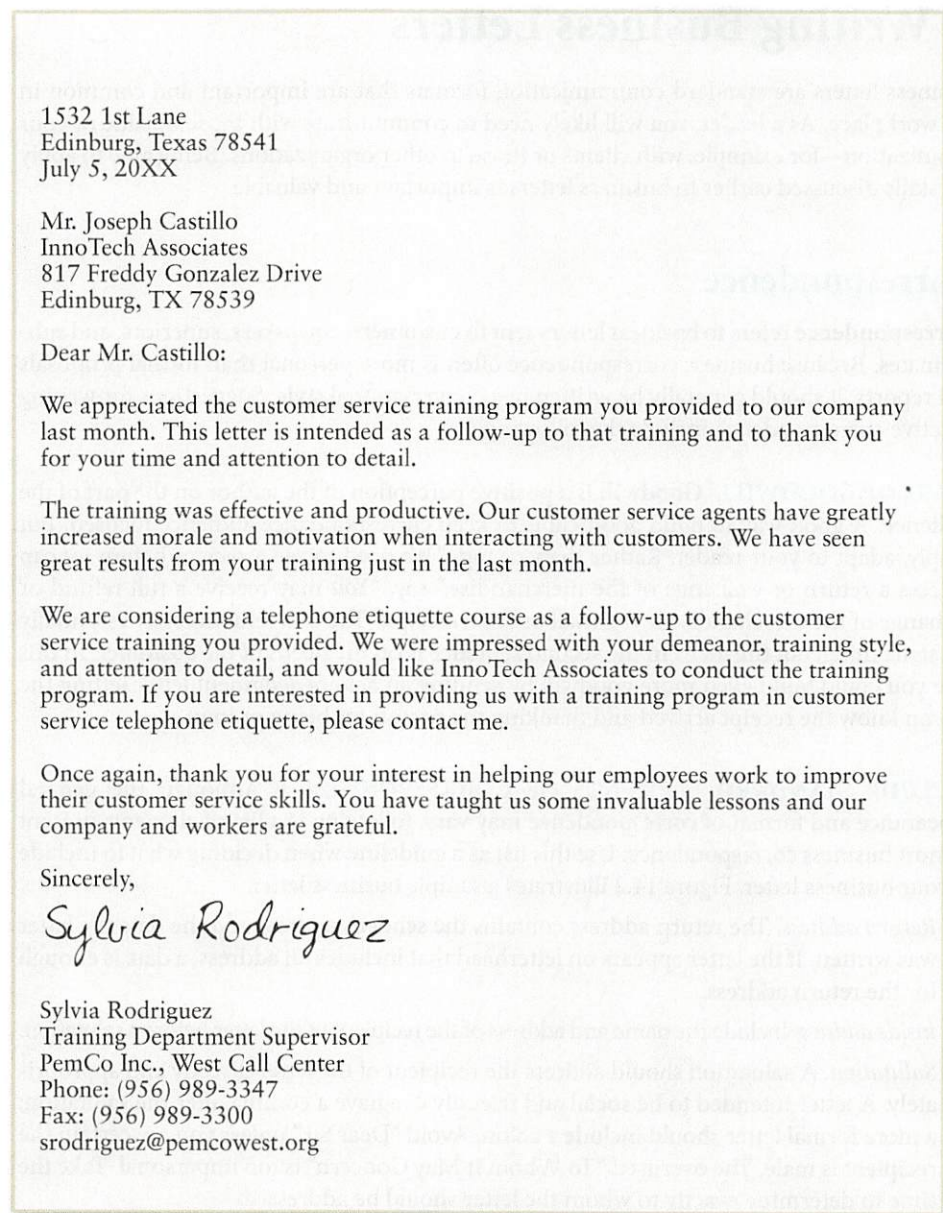
**DELIVER BAD NEWS TACTFULLY** Occasionally correspondence must contain bad news. This must be handled tactfully. A general rule for handling bad news is to deliver it gently and courteously. When presenting bad news through correspondence, consider:

- *Opening with a description of the context, to provide a buffer.* For example, you might begin a letter with “Thank you for applying for the position of service manager at TRH, Inc.”

### terms & definitions

**Correspondence** business letters sent to customers, coworkers, superiors, and subordinates.

**Goodwill** a positive perception of an author on the part of the audience.

**FIGURE 14.2** Sample Business Letter

- *Explaining the bad news rather than simply stating it.* For example, an explanation of a hiring decision might be, "Because of the extensive pool of applicants, we have chosen to place someone in the position with ten years of experience who will need minimum training to begin."
- *Closing with a goodwill message that reinforces a positive relationship with the recipient.* For example, you might close with a statement such as, "With your excellent academic record and ability to put others at ease, we have no doubt you will be successful in finding a position with another organization."

**USE A STANDARD FORMAT** When developing a business letter, you also need to consider the format. A common format for correspondence is the full-block, or standard letter style shown in Figure 14.2. Although organizations may have their own preferred correspondence

format, this format is standard for any letter. Many word-processing programs contain templates for correspondence. If you are using letterhead paper, consider the bottom of the letterhead to be the top of the page when creating margins. Although the length of the letter may vary, it is a good idea to center the letter on the page. A short one- or two-sentence correspondence may be better sent by email. The main consideration with format is that once an organization has developed a standard for outside correspondence, you should be consistent in following the standard in all your correspondence.

## Complaint Letters

There will be times when you are not satisfied with a product or service and believe some restitution is in order. A **complaint letter** expresses dissatisfaction with a product or service. A letter of complaint can be an effective method for resolving a dispute, if it is written with the appropriate tone and does not sound as though you are being accusatory or whining. You might even get more than you expected. Many businesses appreciate knowing when something is going wrong, and they will do what they can to create goodwill with a dissatisfied customer.

The following suggestions will help you write a letter of complaint that's likely to be read and acted on.<sup>32</sup>

- *Complain only when appropriate.* Sending numerous frivolous letters of complaint will get you nowhere. Send your letters only for genuine problems and only after initial communication with company representatives has failed. In other words, if the widget you bought didn't work as expected, ask the salesperson or the customer service department to correct the problem before you fire off a letter of complaint to the head office.
- *Address the letter to the correct person.* You need to reach the person who has the authority to correct the problem. If your complaint is with a local business, address the letter to the owner or manager. If you're dealing with a local branch of a large corporation, you'll need to find out whether your complaint should be sent to the local branch or if the problem was created by policies set by a corporate office. It might take some detective work to find out who should receive your letter. If you can't find out by asking, try the company website, annual reports, or business directories in your local library.
- *Be courteous and professional.* Avoid sarcasm. No matter how angry you are, sending a rude, discourteous, inflammatory letter will not help you get the problem corrected.
- *Keep it short.* One page is all you need. A recipient is more likely to read and act on your letter if you keep it brief and to the point. No one has time or patience to wade through a six-page tome.
- *Be factual.* Identify the problem and outline the efforts you have made to correct the problem. Remember the questions journalists typically try to cover in their writing: Who, What, When, Where, and How.
- *Identify what you want.* You have a complaint. What will it take to make things right? Do you want your money refunded? The product exchanged? A service contract extended? An apology? Stipulate what you want, and you are more likely to get it.
- *Remember to date your letter and include full contact information,* including an email address and account numbers or any other information that the recipient might need to trace your problem.
- *State consequences only if previous letters have failed to get the problem corrected.* It is both unnecessary and ineffective to start out with threats of punitive action. Remember, other people dislike receiving threats as much as you do. But, when previous attempts have failed, it's time to state what you are prepared to do, and when.

Leaders regularly communicate through written correspondence to those outside of the organization. Equally important as writing letters to those outside the organization or team is learning effective strategies for writing other types of business documents, especially interoffice documents.

### terms & definitions

**Complaint letter** a letter that expresses dissatisfaction with a product or service.

## Write for Insight<sup>33</sup>

Sheila Lirio Marcelo, founder and chief executive of Care.com, gained valuable advice on how to become more mindful and skilled by doing something simple: write. As part of her own executive development program, Sheila hired an executive coach to enhance her leadership and communication skills.

When asked what the most valuable pieces of advice she received from her executive coach she replied, "The first thing she gave me advice on, and I give it to everybody, is to journal. Write things down. When you come out of a meeting, or you come out of an interview, or you just finished running a session, what's on your mind? How did it make you feel? How did you make people feel? What's going on? Again, it was raising my self-awareness around my management style. I think that was critical."<sup>34</sup>

To use this simple technique you don't need expensive equipment or the latest technological tools. Although you could record your observations on a blog, Facebook, or

Twitter, you could be low-tech and just keep a notebook and pen handy to record thoughts and observations. Keeping a journal of your ideas and impressions can help you be more observant and thoughtful. It can also enhance your awareness of yourself and others.

When starting a journal your entries need not be lengthy or overly detailed. Just jot down observations about yourself, your feelings, moods, and ideas as well as your reflections about others. Making a conscious effort to write your thoughts and observations can be an effective way not only to increase your self-awareness (principle one), it can also enhance your writing skills as you practice describing what you observe and experience. Your writing skills improve as you continually work to develop your ability to write what you see, hear, and do. In this chapter we've emphasized the importance of how you write messages to others. Also consider the value of writing to yourself to sharpen your communication and leadership talents.

## Writing Business Documents

As a leader, you will be responsible for organizing and developing a number of business documents, including memorandums (more commonly known as memos), progress and activity reports, sales proposals, and formal reports. This section outlines the basic components of each type of document, as well as considerations for their appropriate use. The sample documents provided are only guidelines; organizations may have their own procedures and formats for the various types of business documents.

### Memos

A **memo** is a short and usually informal written communication to others within an organization. Memos are used as reminders or to pass along information. Memos can be as simple as a sentence written on a sticky note, but they are usually printed on company letterhead. An example of a memo appears in Figure 14.3. Although there is no standard format for memos, they should generally contain at least some form of each of the following elements:<sup>35</sup>

**HEADING** The heading should note the sender and the recipient, the date, and the subject. Ensure that all names of individuals who need to receive the memo are included following the word *TO*. If the subject of the memo is relevant to only one person, do not send the memo to the entire office. Also, be certain that material is not too sensitive to put in a memo; sometimes a face-to-face conversation or a phone call is preferable. For example, a memo is an inappropriate way to notify employees of a layoff. Memos are most effective when they communicate company or job objectives, such as a change in a standard procedure or a department reorganization.

**BODY** Although a memo's length can vary, depending on the content, a good rule is to keep it under one page. Many organizations have standard memo formats, so it's best to check with your organization first and follow established standards.

### terms & definitions

**Memo** a short, informal written communication within an organization.

TRH Incorporated

TO: Kay Marquez, Service Manager  
FROM: Stephanie Ramos, Local Store Marketer  
DATE: May 17, 20XX  
SUBJECT: Opportunity for local ad campaign

TRH has been offered an opportunity to participate in a local advertising campaign in conjunction with the Chamber of Commerce's "Local Tastes" program.

"Local Tastes" is an annual program featuring community restaurants and other businesses, including a two-week mailer campaign and events at local stores. This campaign culminates in a well-attended day-long event at the convention center featuring products from each participating business.

Participating businesses will be featured on a front page of the mailer, get a 30-second spot with a local news outlet, and be given a booth with banner at the "Local Tastes" event on July 3.

I think this would be an excellent opportunity to get the company recognized in the community and interact with the Chamber of Commerce as well as work with other businesses in the area.

Please respond by May 25 with a decision regarding participating in this event. I need to respond to the Chamber of Commerce and turn in a deposit by June 1.

cc: Juan Brown, Managing Partner

FIGURE 14.3 Sample Memo

**CLOSING** Most memos don't require the standard signature you would find in a letter or other correspondence. It is helpful, however, to include notation of any attachments and a list of people who received copies of the memo. When considering who within the organization should receive copies of your memo, keep in mind that in most companies this can be a highly political issue. Send copies only to those who need the information.

## Progress and Activity Reports

A **progress report** gives updates on the status of a project. Figure 14.4 shows an example of a progress report. Most project reports are generated by a company that has been contracted to do a particular job or provide a service. In such cases, it is appropriate to submit project reports at regular intervals to communicate the project's status and keep all personnel on task.<sup>36</sup> Although the format for project reports varies depending on the project, the policies of the organization providing the report, and the requirements of the client or customer, all reports should maintain the same format for any particular project. Progress reports may contain information about whether a project is within budget. If you anticipate going over budget, mention that and discuss some possible reasons and solutions. A progress report should also include information about how the work is progressing—what has been completed as well as what is anticipated. If you expect you may not complete the work on schedule, discuss this in the progress report and explain what arrangements need to be made to complete the project.

### terms & definitions

**Progress report** a report that outlines for a customer or a client the status of a project.

Date: August 17, 20XX  
To: Juan Brown, Managing Partner, TRH Inc.  
From: Mike Caro, NuSheen Services  
Subject: Progress Report for July 1–29, 20XX

Dear Mr. Brown,

I am happy to say the parking lot and building refinishing project is on schedule. At this point we are somewhat over budget in terms of materials, but I am confident we will finish early enough to save you money in labor costs.

**Costs:** The truck rental went over cost by approximately \$1700 because of two extra days' rental. The other materials are costing out at the price originally quoted to you.

**Work Completed:** The building has now been completely refinished. Work on the outside work area and parking lot still needs to be completed.

**Work Schedule:** With the addition of two crew members, we should be able to complete the work by August 30.

If you have any questions, please contact me.

FIGURE 14.4 Sample Progress Report

When communicating the status of a project within an organization, an activity report is most appropriate. An **activity report** is a document that communicates progress and achievements to others within an organization or on a team. Most activity reports give information on the status of one or several ongoing projects. If several departments are working on the same project, a manager may combine all the activity reports; the combined reports could be the basis for a progress report to send to a client. Activity reports are typically issued regularly (biweekly or monthly in most organizations) and normally do not require a formal structure because the material is familiar to the readers. Although progress reports and activity reports contain similar content, they differ in audience and often in tone. Progress reports are most often written to clients or an audience outside the organization, and they are more formal; an activity report is commonly an internal document, with a less formal structure and tone.

## terms & definitions

**Activity report** a document that communicates progress on a project or achievements to others in an organization or on a team.

**Sales proposal** a document intended to persuade a possible client of his or her need for your product or service.

**Legally binding documents** documents that record an exchange of promises and are enforceable by law.

## Sales Proposals

A **sales proposal** is a document intended to persuade possible clients of their need for your product or service. An effective sales proposal demonstrates to prospective clients that they have a problem and your product or service will help to solve that problem. The writer of a sales proposal must first determine the selling points, or the most attractive features of the product or service, and then construct a document that clearly illustrates these points. The proposal should highlight the specific benefits that customers will receive from the use of the product or service. For example, the owner of a landscaping business might notice that a local restaurant is surrounded by dry dead grass and overgrown shrubbery. In a proposal offering landscaping services, the business owner would try to persuade the restaurant manager of the appeal of a well-kept, lush, green exterior and convince him that landscaping could increase his bottom line.

Keep in mind that in many states, sales proposals are **legally binding documents**, which means that any incentives or benefits offered in the sales proposal must be reasonable

and must be delivered as promised.<sup>37</sup> It is not uncommon for organizations to be sued over failing to deliver on the promises offered in a persuasive sales proposal.<sup>38</sup>

If you choose to use a former client's testimony or image in a sales proposal, make sure you have permission to do so and that you have not fabricated the testimony. For example, if the landscaping business owner wanted to include comments from current or former customers about the quality of her company's landscaping work in her sales proposal, she would first need to get the customers' permission in writing to use the testimony or pictures of the work in the proposal. Following are some guidelines for creating an effective sales proposal that is adapted to the needs of the client.

**OUTLINE THE PROBLEM** Although you may have already discussed the problem with the client, a good sales proposal reminds the potential client of the problem and a need for some solution. Include any requirements the client has mentioned, such as for cost or procedure. Keep your message client focused, aligning yourself with the client's needs.

**DISCUSS YOUR APPROACH** Your sales proposal should discuss exactly what you suggest as an effective solution to the problem. Discuss what particularly needs to be done and how those actions will address the problem. Discuss as well why you and your organization are the best choice for implementing this solution. Mention any support and training you will provide (if necessary) and guarantees on your work or products. The landscaping company owner, for example, could discuss what type of vegetation she proposes to plant around the restaurant, how the plants might be combined and arranged, and possibly a contract for continuing maintenance to keep the outside looking well-cared for.

**DESCRIBE THE BENEFITS** Although they may seem obvious, it is a good idea to identify for the client the biggest benefits of your proposal. Indirect outcomes such as an increase in customer base or employee morale should be outlined. The landscaping business owner could describe what a well-maintained exterior communicates to customers and other business owners about the restaurant. Keep in mind, however, that this section should not promise anything that may not be within your power to fulfill. You can expose yourself and your organization to legal consequences if promised benefits are not realized.

**MENTION SCHEDULE AND COSTS** A sales proposal should outline a proposed schedule and cost estimate. These things will later be detailed more formally in a contract but should be discussed in a sales proposal so there will be no surprises later. The restaurant manager may expect the job to start tomorrow and be completed in two days; the landscaping company owner needs to communicate clearly about whether that timeline fits with her schedule. Most clients will not be willing to move on to the contract stage of the process without a clear outline of proposed costs and schedule.

## Formal Reports

A **formal report** is a highly detailed and comprehensive report on an ongoing project or a completed project that is often coauthored by several writers. For example, if you were implementing new procedures in your organization over a twelve-month period, you might send out a status report midway through the implementation process to those affected by the changes. Once the implementation process was completed, you would send out a final report detailing the process and the effectiveness of the implementation. Reports are more strictly formatted than most other forms of business correspondence, and the format varies according to company policies. Reports are divided into three main parts: the front matter, the body, and the back matter. Each part contains several elements whose order and length vary according to company recommendations. Following are basic descriptions of the components of a formal report.<sup>39</sup>

**FRONT MATTER** **Front matter** consists of those aspects of a report that come at the beginning and serve to prepare the reader for the main information. The report title, the authors' names, lists of the report's contents, and a brief summary should all be a part of the front matter.

## terms & definitions

**Formal report** a highly detailed and comprehensive report on an ongoing project or a completed project, often coauthored by several writers.

**Front matter** the components of a report that come at the beginning and prepare the reader for the main information.

- *Title page.* A title page contains the full title of the report, a list of the writers' or researchers' names, date(s) of the report, the organizational affiliations of the writers, and the organization to which the report is being submitted.
- *Abstract.* An abstract is a summary (two or three paragraphs) that highlights the major points of the report.
- *Table of contents.* This should list all the major sections of the report along with page numbers.
- *List of figures and tables.*
- *Foreword or preface.* A foreword is an optional introductory statement about the report written by someone other than the authors; a preface is an introduction written by an author.

**BODY** The body of a formal report contains the main information in the report, including the reasons for researching the topic, how it was researched, and what was discovered.

- *Executive summary.* This summary provides a more complete overview than the abstract.
- *Introduction.* The introduction provides readers with the report's purpose and scope.
- *Text.* The text presents details on how the topic was researched.
- *Conclusions and recommendations.* This section discusses the findings of the research and consequent recommendations that are offered. Conclusions may be discussed in a separate section from recommendations.

**BACK MATTER** **Back matter** refers to those components of a report that traditionally come at the end of the report, after the main body, and that provide further detail and references.

- *Appendixes.* Any appendixes clarify or supplement information in the body of the report with information that is detailed or lengthy and is not necessarily relevant to all audiences.
- *Bibliography.* This is an alphabetical list of all the sources that were cited and consulted in researching the report.
- *Glossary.* This is an alphabetical list of terms and their definitions.
- *Index.* An index is an alphabetical list of all the major topics and subtopics discussed in a report, citing page numbers in the report where the reader can find those discussions.

If you work for an organization that requires you to write regular formal reports, it is a good idea to use a word-processing program style sheet to create a format for the report. You can then save it as a template and create future reports with the same format. You won't have to refigure font styles and sizes, margins, and the like.

Leaders have many opportunities to write various kinds of business documents. Letters are generally more formal and addressed to those outside the organization. Memos and activity reports are common interoffice communication forms. Progress reports, sales proposals, and formal reports are common business documents that most leaders will frequently compose or help to compose.

## terms & definitions

**Back matter** the components of a report that traditionally come at the end, after the main body, and provide further detail and references.

## Wrap-Up

Writing is a vital skill for business professionals, and learning to write well can be the key to an individual's success in the workplace. Professionals with effective, well-developed writing skills assist their leaders in fostering and maintaining an image of a competent organization with competent people. In addition, effective writing can lead to improved communication within an organization. To develop or enhance your basic writing skills, make sure to:

- Organize your document using paragraphs to identify the main ideas, and chunk your information.

- Use a writing style appropriate for the topic, audience, and occasion. Pay attention to the tone of the document.
- Write clear, concise messages to ensure understanding.
- Be sure to proofread the document for spelling and grammatical errors, which can damage your credibility. Do not rely on word-processing spell-check programs alone.

In our media-saturated workplace, we need to understand the importance of using technology effectively in written communication at work. Focus on using technology thoughtfully, selecting the correct medium for the message.

- Use media-rich channels for more emotional or personal messages.
- Use email thoughtfully, considering such details as spelling and grammar, tone, appropriateness of the message, and including a subject line.

Professionals at every level of the corporate ladder will likely find themselves writing letters. Even with the advent of new technology to assist us in the writing process, it remains important to understand the basics of standard business letters.

- When writing correspondence, take a moment to develop goodwill, deliver bad news tactfully, and develop or follow a standard format for all letters.
- Complaint letters are a specific form of business letter. Effective complaint letters often produce results. Make sure to ask for what you specifically want, and avoid being offensive in how you describe the problem.

Business professionals will also learn to write other forms of interorganization communication, including:

- Memorandums, or memos, are one of the more common types of interoffice communication.
- Progress and activity reports are effective for keeping all parties informed as a project develops.
- Sales proposals, when written effectively, can increase an organization's outcomes, such as number of clientele and profits.
- Formal reports use more structure and are often developed for clients, coworkers, supervisors, and stakeholders.

## Reviewing Key Terms

Topic sentence 361

Coherence 361

Writing style 361

Tone 361

Biased messages 362

Clarity 362

Jargon 363

Concise writing 363

Telegraphic style 363

Grammar 365

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Complaint letter 373

Memo 374

Progress report 375

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Formal report 377

Front matter 377

Back matter 378

## The Principle Points

This chapter focuses on the technical and aesthetic skill of business writing. As business leaders place more emphasis on the writing abilities of their new hires, developing these

skills remains vital. Writing focuses specifically on Principle Two, verbal messages, but the process of converting your thoughts into effective written documents requires making use of all five communication principles.

**Principle One: Be aware of your communication with yourself and others.**

- When writing business letters and memos, be aware of who will be reading the message and the level of detail and amount of background information that may be needed or expected.
- Be aware of the intended reader's expectations regarding the length, format, and style of the message.

**Principle Two: Effectively use and interpret verbal messages.**

- Use an appropriate written style (including tone and vocabulary) for memos or letters.
- Write clearly: Be concise, use appropriate subordination, avoid jargon and redundancy, and use appropriate grammar and accurate spelling.
- Express ideas briefly yet clearly; business and professional writing should get to the point yet provide enough detail to help the reader understand if any follow-up action is needed.

**Principle Three: Effectively use and interpret nonverbal messages.**

- The type of font used, placement of margins, and the number and style of headings and subheadings provide nonverbal information to complement the ideas you are communicating in writing.
- When appropriate, use images, color, or other visual information to make your written message clear, accurate, and interesting.

**Principle Four: Listen and respond thoughtfully to others.**

- Accurately listening for details and major ideas is important when you need to summarize spoken messages in writing.
- If you are uncertain about expectations regarding format or other aspects of written correspondence, ask others and then listen to their responses, which will guide you in preparing written messages.

**Principle Five: Appropriately adapt messages to others.**

- Adapt the format, structure, word choice, and style of a written message depending on the recipient and the function of the message.
- When composing a response to an email message, pay attention to cues in the original email and adapt your response accordingly. If your correspondent's email message was short, he or she may only expect a brief response; a longer, more detailed message may signal that he or she expects a more comprehensive response.

## Applying Your Skills

1. Imagine you missed a class due to a family emergency. Write an imaginary email to your professor, informing her of the reason for your absence and requesting makeup work, information on what you missed, and so on. Consider the following: How long should the email be? What might you put for the subject line? What tone should you use? Make sure to proofread.
2. Rewrite each of the following phrases using concrete words:
  - a. Sometime this summer
  - b. A substantial saving
  - c. A large number of people in attendance
  - d. Increase efficiency

3. Rewrite the following messages so that they are more concise:
  - a. We wanted to invite you to our Kids' Night special this Tuesday night. The kids will have a lot of fun as we will be having face painting, kids' games, and the kids can color. The kids eat free as well!
  - b. We are sending this mailer to let you know that we are giving a free gift and music CD with every \$50 you spend on gas at our gas station. The promotion is going on this weekend, July 18–20.
  - c. The supervisor plans to go to the meeting that will be held on Monday evening at a little bit after 7 P.M. at night.
  - d. Welcome. We are happy to have in this afternoon's meeting a guest, Mr. Paul Emerson. Mr. Emerson works at the local Chamber of Commerce and he is here to tell us a little bit about the "Local Tastes" program. If after this afternoon's meeting you still have more questions regarding the "Local Tastes" program, feel free to call Mr. Emerson at his office.
4. Think of a time when you were dissatisfied with either a service or a product. Draft a complaint letter, focusing on the suggestions for complaint letters mentioned in this chapter. Exchange letters with a classmate and critique each other's letters.
5. Examine the following messages. Considering the media richness continuum discussed in this chapter, identify a medium that would most suit each message. Give your reasons why. Which medium is least suited for each message? Why?
  - A complaint about a customer service agent
  - A meeting time has changed
  - A report to the team leader about progress on a project
  - A discussion with your supervisor about conflict with another employee
  - A discount offer for services to select clients
  - A notice of a potential layoff

# Appendix

## Managing Time: Managing Communication

### appendix **outline**

Develop Written Goals and Objectives 385

Make a Master List 387

Prioritize Your Work 388

Manage Interruptions 390

Take Action 395

Work Efficiently on Team Projects 397

#### **After reading this appendix, you should be able to**

- Write appropriately worded goals and objectives that are specific, measurable, attainable, and observable.
- Make a master list of work tasks and projects.
- Identify and implement strategies for prioritizing work.
- Develop strategies for managing work obstacles to achieve work goals and objectives.
- Take appropriate action to increase work efficiency on team projects.