

E-mails, Texts, Memos, and Letters

E-mails, text messages, memos, and letters are among the most frequently written business documents. Because people receive so much correspondence, they can often overlook, forget, or misread important messages.

Quick Tips

- Prepare readers for the key information in your message by using a clearly worded subject line or opening sentence.
- Put the most important information in the opening paragraph.
- Use formatting techniques to help readers proceed rapidly through your message. The format should help readers recognize the organization and major points of the message.
- Always be concise. Keep sentences and paragraphs short. Readers should not have to read your message more than once to grasp your meaning.
- Try to keep your message to a single page or screen. If your message exceeds a single page or screen, use headings to guide your reader through it.
- Keep a copy of every message you send and every message you receive for at least 2 years. When others forget what they wrote to you or what you wrote to them (or the fact that you wrote at all), your ability to retrieve the message in question will save time, avoid arguments, correct mistakes, and reinforce your reputation for efficiency.

E-MAIL AND TEXT MESSAGES

E-mail and text messages constitute the majority of job-related communication. You will likely find yourself reading or writing at least 100 e-mail and text messages every day. Text messages are by definition brief and, thus, ideal for urgent notifications and quick acknowledgments—information that can't wait for e-mail. Appropriate e-mail and texting etiquette continuously evolve, but both kinds of messages require conciseness and readability. Keep in mind that typical mobile devices display the list of incoming e-mail messages with the opening five lines of each message and the list of incoming text messages with the opening two lines. You will assist your recipients in navigating their incoming messages if you make sure that your key point is located in the opening lines.

Consider, for example, the series of informative and encouraging text messages prepared by the Department of Health and Human Services in conjunction with the American Academy of Pediatrics (see Figure 7-1). Addressed to mothers and fathers of young children and sensitive to the strains of family life, these once-a-week parenting tips average 145 characters (including spaces) to make for quick and convenient reading. Which do you think are effective? Notice that the messages written with “be” verbs and punctuated as exclamations sound unconvincing and condescending: for example, “Lowfat milk & water are the best drink choices for your child, but we all need variety! Limit sugar-sweetened drinks like soda to special occasions.” Choose action verbs whenever possible, keep your messages brief, and leave the exclamations for emergency warnings only: for example, “Lowfat milk & water make the best drink choices for your child. Limit juice and soda to special occasions.”

Note also that a growing problem involves people texting carelessly and without thinking of issues that could arise if their messages were later forwarded to others or made public. Always exercise discretion in texting. Keep in mind that everything digital is infinitely available. As hundreds of government and corporate officials across the world have discovered, if you or anyone you know is ever investigated for any kind of impropriety, all of your e-mail and text messages could be exposed for humiliating scrutiny.

MEMOS AND LETTERS

Memos, the relatively short and informal documents that circulate within organizations, address internal decisions and operations. Memos can be posted to the organization's website (including bulletin boards, blogs, and wikis), sent as attachments to e-mail messages, or printed and distributed.

Letters differ from memos in that letters are usually written to individuals outside the writer's organization, but they can be used as official documents within an organization. Like memos, letters can be sent as e-mail attachments. Memos serve

ted communication, e-mail and text messages, ideal for urgent can't wait for e-mail, e, but both kinds of that typical mobile opening five lines of e opening two lines. messages if you make

couraging text messages in conjunction Addressed to mothers of family life, these (spaces) to make for five? Notice that the tions sound unconvincing are the best drink sweetened drinks like sible, keep your messages only: for example, child. Limit juice and

carelessly and without later forwarded to . Keep in mind that ment and corporate know is ever invested messages could be

circulate within organization can be posted to the (wikis), sent as attachments

to individuals outside documents within an organization. Memos serve

TXT4Tots: Parenting is a busy job! Take time when you grocery shop to pick out easy to eat on-the-go healthy snacks like a banana or whole grain cereal.

TXT4Tots: Lowfat milk & water are the best drink choices for your child, but we all need variety! Limit sugar-sweetened drinks like soda to special occasions.

TXT4Tots: Toddlers like to copy everything you do. Demonstrate healthy habits you want them to learn like eating fruit for snacks & walking after dinner.

TXT4Tots: Sometimes it seems harder to be active inside, but you can do it! **TXT4Tot tips:** 1) Play hide and seek 2) Create an obstacle course with pillows.

TXT4Tots: Snacking on the run? Keep lowfat cheese sticks, bananas, and small, whole grain crackers on hand. 2-3 snacks a day can help prevent temper tantrums.

TXT4Tots: Create an activity chart with your child. Track active play time at home or childcare with stickers for each activity. Think of a fun reward!

TXT4Tots: Eating directly out of a box or container can allow for overeating. Make sure to serve food from a plate, bowl, or dish.

TXT4Tots: Get moving! Make a list of your family's favorite ways to be active. Each Saturday pick an activity out of a hat to do together.

TXT4Tots: Try to set screen time limits for the entire family. After the time is up, play board games or work on a puzzle together.

TXT4Tots: Eat as a family whenever you can. Keep meal time relaxed to nourish the body & help your family stay connected.

FIGURE 7-1 Sample Text Messages from the Txt4Tots Series.

Source: US Department of Health and Human Services, Health Resources and Services Administration. "TXT4Tots" <http://www.hrsa.gov/healthit/txt4tots/txt4totsfiles.html>. This TXT4Tots Library of Messages was developed under a cooperative agreement between the American Academy of Pediatrics and the Health Resources and Services Administration of the U.S. Department of Health and Human Services. This version of the Library represents a derivative work.

as intraorganizational communications only and are not accepted channels for official business with other companies and clients.

Both memos and letters must be worded and formatted for quick skimming and rapid reading. Consider the letters in Figures 7-2 and 7-3. Which would you be more likely to read? Why?



DEPARTMENT OF HEALTH & HUMAN SERVICES

Public Health Service

Centers for Disease Control and
Prevention (CDC)

March 18, 2013

Dear Colleagues,

World TB Day is March 24. This annual event commemorates the date in 1882 when Dr. Robert Koch announced his discovery of *Mycobacterium tuberculosis*, the bacillus that causes tuberculosis (TB). This day is observed each year to raise awareness about TB-related problems and solutions and to support worldwide TB-control efforts. For the second year, the Centers for Disease Control and Prevention (CDC) joins the global Stop TB Partnership in adopting the slogan *Stop TB in my lifetime*, which echoes the theme of calling for a world free of TB. The slogan and theme encourage people worldwide to make an individual call to stop TB and say what changes they expect to take place in their lifetimes.

One of the goals of this year's campaign is to highlight personal stories from TB patients and their families, focusing on the services and support that public health programs provide to successfully diagnose and treat people with TB disease and latent TB infection. The stories are available on the CDC TB website. I hope you will visit this page and share these stories with other colleagues, both in the United States and globally. DTBE also has developed resources in English and Spanish to assist partners in developing messages for World TB Day. I hope that you find these resources useful and incorporate them into your World TB Day events and activities.

Lastly, on March 22, 2013, CDC will host a World TB Day event that will be available via live webcast. The event will highlight 2012 U.S. TB surveillance data, as well as a keynote address by Dr. Susan Ray, Professor, Emory University School of Medicine, Atlanta, Ga. For more information about this event, please visit the event webpage.

Let's continue to reach out to those at highest risk for TB and to identify and implement innovative strategies to improve testing and treatment among high-risk populations.

Thank you for all the work you do to Stop TB in our lifetime!

Sincerely,

Rima F. Khabbaz, MD
Deputy Director for Infectious Diseases
Director, Office of Infectious Diseases
Acting Director, National Center for HIV/AIDS, Viral Hepatitis, STD, and TB Prevention
Centers for Disease Control and Prevention
<http://www.cdc.gov/nchhstp>

RADM Kenneth G. Castro, M.D.
Assistant Surgeon General, U.S. Public Health Services
Commanding Flag Officer, CDC/ATSDR Commissioned Corps
Director, Division of Tuberculosis Elimination
National Center for HIV/AIDS, Viral Hepatitis, STD, and TB Prevention
Centers for Disease Control and Prevention
<http://www.cdc.gov/tb>

FIGURE 7-2 Letter

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Campaign Slogan: Stop TB in my lifetime

For the second year, the CDC joins the global Stop TB Partnership in adopting the slogan *Stop TB in my lifetime*. This slogan echoes the campaign theme of calling for a world free of TB.

Campaign Goal: Highlight Patient and Family Stories

One of the goals of this year's campaign is to highlight personal stories from TB patients and their families, especially about the services and support that public health programs provide to successfully diagnose and treat people with TB disease and latent TB infection. The stories are available on the CDC TB website. Please visit this page and share these stories with colleagues both in the United States and globally.

Campaign Resources: Help with Developing Messages

CDC's Division of TB Elimination has developed resources in English and Spanish to assist partners in developing messages for World TB Day. I hope that you find these resources useful and incorporate them into your World TB Day events and activities.

Campaign Event: Live Webcast on March 22

CDC will host a World TB Day event that will be available via live webcast. The event will highlight 2012 U.S. TB surveillance data and include a keynote address by Dr. Susan Ray, Professor, Emory University School of Medicine in Atlanta. For more information, please visit the event webpage.

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FIGURE 7-3 Revised Letter

GUIDELINES FOR ENSURING QUALITY

- Make sure you look and sound professional as you choose words and put together sentences. Review and proofread messages carefully before you send them. Note especially that every digital message you send will exist indefinitely and could easily be forwarded to additional readers across the world or obtained by unexpected audiences for years to come. Note also that every message you send or receive through your company e-mail account and every text message you send or receive through your company's message service is subject to review at any time by officials of your company and their legal representatives. Your only assured privacy covers messages sent or received through your private accounts on your personal equipment.
- Keep the six C's in mind as you develop e-mails, texts, memos, and letters: be *concise*, *concrete*, *complete*, *correct*, *courteous*, and *clear*. Be attentive to how your words can be perceived by your reader. Rephrase anything that you think might be construed in ways you do not intend.
- Be aware of how your message looks. A letter or memo with typographical or formatting errors makes an unfavorable statement about you and your organization. Design e-mail messages with equal care because these may be printed and copies made and distributed.
- Watch for spelling errors as well as errors in sentence structure and word usage. For especially important e-mail messages, consider printing copies before you send them. Editing printed material often reveals errors you may miss as you compose or proofread on a screen. Also use the spellcheck function available on your e-mail application to help you find errors, but keep in mind that spellcheck is no substitute for careful reading.
- For clarity in international communication, spell months of the year instead of using numbers; that is, 3/11/14 would likely be read as March 11 in the United States but as November 3 in Europe and Asia, and readers won't necessarily know whether you are using your practice or trying to be sensitive to cultural differences and adopting theirs.
- For text messages on the job, avoid slang and abbreviations unless you know your recipient personally. Always keep your messages on point and professional. Always assume that your message could be forwarded to your boss, published in the newspaper, or distributed on Twitter.
- For memos, letters, and e-mail messages, use the following structure:

First Paragraph:	State the purpose of the message or the main information the reader needs. If your message delivers unfavorable news, you may want to cushion the reader's disappointment with a gentle and supportive opening.
Middle Paragraphs:	Support or develop the main topic stated in the first paragraph. Limit each paragraph to one idea.

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Final Paragraph:

Tell the reader what to do or what position to take. If appropriate, include closing comments (e.g., offer to explain in greater detail or answer questions).

APPROPRIATE TONE IN E-MAILS, TEXTS, MEMOS, AND LETTERS

Be careful of how you come across to your readers. What you write always carries with it a perceptible attitude toward the audience and the subject. As they absorb your message, readers often vocalize your sentences and phrases. Anticipate the intonation that your readers will attach to what you write. Adopt a respectful, positive perspective toward your reader—a “you” attitude that addresses the subject from your reader’s point of view—and avoid wording that might sound rude, sarcastic, or irritable. Remember: You want to be clear, but you also want to maintain a favorable relationship with your readers.

Avoid phrases that suggest that the reader is careless or unintelligent:

You neglected to . . .

You failed to . . .

I fail to understand how you could . . .

Also avoid phrases that imply that the reader might be lying or exaggerating:

You claim that . . .

Avoid writing what your reader might interpret as excessive flattery. Many people are sensitive to insincerity and suspicious of any attempt to induce them to respond in a certain way:

It is indeed a profound privilege for us to work with you on your immensely important project.

We look forward to the extraordinary opportunity to submit to you our full proposal. Your firm is known worldwide for its commitment to excellence and value, which in all humility we are confident we offer.

Attempting to sound formal and objective, however, can often produce impersonal writing:

The changes agreed upon per our conversation are herein included.

Your immediate reply will be greatly appreciated.

Instead, write with a conversational tone that lets your reader know that you are grateful for his or her attention:

The changes included here were the ones we discussed during our telephone conversations.

Please let us know your decision as soon as you can.

Many times, in an effort to be clear, writers may sound tactless:

If your employees had actually read the procedures before trying to install the pump, they would have seen that the installation requires that the sealant be allowed to set for 1 hour before beginning the second stage of the process. Not following this procedure causes the diagnostic to shut down because the sealant has not dried enough to absorb the test stress. To avoid future installation problems, please see to it that your employees read the procedures and read them thoroughly.

Thinking about the emotion that your writing may convey or provoke will help you to present the same idea in a less caustic way:

Please note in the procedure manual that the second stage of the installation process cannot begin until the sealant has set for 1 hour. This amount of time is necessary for the sealant to dry enough to absorb the test stress. If the second stage of the installation process is attempted before the sealant has dried, the diagnostic will shut down.

Following are additional examples of tactless phrasing and their revisions:

Regrettably, equipment expense reimbursements are not allowed.

Versus

My office can reimburse you for travel-related expenses only. Your invoice for equipment may be submitted to the VP of Operations.

We cannot fulfill your request for a list of company positions and annual salaries as none but company executives are allowed to have access to this information.

Versus

The list of positions and salaries you requested is confidential information limited to use by our company personnel only. For your research, however, we can send you related information on industry-wide trends in similar positions.

GUIDELINES FOR DEALING WITH TONE

As a writer, you cannot anticipate every nuance of meaning that your message will have for your reader. But you can achieve clarity and maintain goodwill with your reader if you keep the following guidelines in mind as you compose any letter, memo, text, or e-mail:

- Allow more time for designing messages that arise from sensitive issues and that may be subject to misreading. Try to avoid sending bad news by text or e-mail.

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- Anticipate the effects of messages that will convey negative or unwelcome news. These can be misinterpreted by readers, who can also misjudge your attitude toward them and the information you are transmitting. People often take bad news personally and may be more inclined to take offense or respond with anger.
- Always analyze your reader as carefully as possible, particularly the reader's frame of reference and attitude toward both you and the subject. Always be courteous.
- Read aloud what you have written. When you hear what you have written, you may often detect words and phrases that don't convey the attitude you intend.
- For any especially difficult message, compose the message, save the draft, and then let it cool for a while. Later, read the message aloud to check for clarity and courtesy.

PLANNING AND WRITING CORRESPONDENCE

The following cases (7-1 through 7-6) introduce typical situations on the job in which writers must write a letter, memo, or e-mail message.

Review of Principles

As you plan your e-mails, texts, memos, and letters . . .

10 Questions to Ask Yourself

1. How well do I know the readers?
2. How much do they know about the topic discussed in the message?
3. How will they respond to what I will need to say? In what ways can I use this communication to build rapport for my organization?
4. What exactly am I trying to accomplish with this message?
5. What is their level of knowledge about the subjects discussed?
6. What is their attitude toward me and my organization?
7. What previous business dealings have I/we had with them?
8. How much and what kind of information should I include, based on their profile?
9. How technical can I be in presenting my message?
10. What strategies can I use to make this message easy to read and understand?

Case 7-1: Informational E-mail Message

David Reilly, an administrative assistant to HCI's chief financial officer (CFO), must notify 14 division managers of a meeting to deal with looming budget cuts. David decides to attach three documents that those attending will need to have read by the meeting. The e-mail message explains the reason for the meeting, the documents attached, and the proposed agenda. As David explains, everyone should bring the attached documents to the meeting.

This e-mail message exemplifies effective design (Case Document 7-1). Note the clearly phrased subject line, the action-required statement in bold type, and the placement of the main information—the meeting and required attendance—in the opening sentence. The meeting agenda appears as a list, and the managers are told exactly what they must do with the attached materials. The message is concise and visually accessible.

CASE DOCUMENT 7-1

From: David Reilly [david.reilly@hci.com]
Date: February 27, 2014
To: Operations Support Staff
Subject: Agenda for March 12 Meeting on Proposed Budget Cuts

Attachments: CFO 1-31.pdf, NSP bid.pdf, OSHA oxygn proc rev.pdf, SHR mntnc cost.pdf

ACTION REQUIRED: Prepare New Cost Figures for Your Projects by March 12

All division managers are required to attend a March 12 meeting to decide how to cut the third and fourth quarter budgets. Please refer to the CFO's memo of January 31 (see attached) for guidelines on cuts.

You will receive a separate e-mail message later today asking you to put this mandatory meeting on your calendar. Please clear your calendar now of any conflicting appointments.

Time and Location: March 12, 8:00–11:00 a.m., Third Floor Conference Room

Please have four copies of your budget prepared with the 15% cut suggested by the CFO's 1/31 memo.

Message

Chief financial officer (CFO),
 al with looming budget cuts.
 e attending will need to have
 the reason for the meeting,
 a. As David explains, every-
 eeting.

1 (Case Document 7-1). Note
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 Please refer to the CFO's
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Meeting Agenda

1. Budget presentations and discussion
2. Proposed bid development on the North Shore Power project (see attached)
3. Revision of Procedures to Meet OSHA guidelines on oxygen tanks (see attached)
4. Cost overrun problem with maintenance contractors on the Signal Hill Reclamation project (see attached)

Please review all attached documents and be prepared to discuss viable solutions.

If you have problems or questions, please let me know.

DR

David Reilly
 Administrative Assistant
 Office of the CFO
 HCI, Inc.
 889-742-2500

Case 7-2: Instructional Memo

The following memo (Case Document 7-2) announces Quaker Pharmaceutical's new agreement with a local rental car dealership and provides instructions for renting cars for business use. The writer, Luning Jiang, suggests that readers may want to keep the memo for reference.

CASE DOCUMENT 7-2

MEMORANDUM

TO: Quaker Pharmaceutical sales representatives
FROM: Luning Jiang
SUBJECT: New Benefits from Horizons Rent-A-Car
DATE: 10/17/14

Quaker Pharmaceutical signed an agreement today with Horizons Rent-A-Car offering a 20% discount for all business-related travel. Please retain this memo for your files.

Business Vehicle Guidelines

- 1 or 2 employees traveling: use compact car; 3 or more employees traveling: use sedan or minivan.
- Luxurious vehicles for transporting clients or potential clients must be approved by your supervisor.
- Please lease the most economical vehicle available.

Regulations

- Employees are expected to follow all traffic laws.
- Employees under 25 cannot drive unless accompanied by a fellow employee over 25.
- Vehicle cannot be used to transport persons or property for hire.
- Vehicle cannot be used to tow anything.
- Horizons Rent-A-Car and Quaker Pharmaceutical are not responsible for loss or theft of personal belongings left unattended in the vehicle.

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Reservations

To reserve your car for business travel, go online at www.you-go.com or call 1-800-RENTCAR.

- Valid driver's license needed for reservation
- No deposit required

Online Instructions:

1. Go to <http://www.you-go.com>
2. Locate login box for Gold Corporate Customers (GCC)
3. Enter username: QPrenal (case-sensitive)
4. Enter password: your last name (all lowercase)
5. Follow remaining steps as prompted

For questions, contact Shirley Kimball, the Office Services Manager, at 898-757-3478 by call or text.

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Case 7-3: Letter Requesting Information

Juanita Márquez serves as local arrangements chairperson for the American Society of Engineering Education's (ASEE's) regional meeting. One of her first responsibilities is to locate a hotel in which the regional meeting can be held. She decides to send a letter to seven hotels near the sports arena so that conferees can enjoy sports events during the evenings of the 3-day conference. Juanita writes the same letter to all seven hotels requesting information about their facilities.

When Juanita writes to each of the seven hotels, she has a number of questions she needs to be answered about availability, facilities, and equipment. Juanita needs each hotel to respond by a specific deadline, and she wants to be sure that every hotel supplies all of the information she requests. With these answers, she can compare costs and services of hotels that are interested in hosting the convention. She uses a *block letter format* with all elements aligned on the left margin. She chooses to conduct this correspondence by formal business letter instead of e-mail, to make sure she obtains signed paper copies of all promises made by the hotel representatives.

CASE DOCUMENT 7-3

Pittsburg City College
200 Rosser Hall
Department of Civil Engineering
Pittsburg, KS 66760

(date)

(name of convention manager)

(name of hotel)

(mailing address)

(city, state, zip)

Dear ():

The South Central Chapter of the American Society of Engineering Education will have its annual meeting in Kansas City, April 22–26, 2016. With the

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26, 2016. With the

convention 15 months away, the local arrangements committee is seeking a hotel that will serve as convention headquarters. Our committee would like to consider your hotel as a possible site because of its location and its reputation in handling conventions. By March 1, 2015, I will need answers to the following questions, if you are interested in hosting our convention. I will contact you by telephone no later than March 15, 2015, to arrange an appointment to discuss our needs and your facilities in further detail.

Number of Conferees Expected

Based on registration from past conventions, we expect approximately 500 people to attend. Of that number, approximately 450 will need rooms. Of that number, approximately 250 will require double occupancy rooms.

Conference Accommodations Needed

We need you to provide answers to the following questions:

1. Can your hotel accommodate 500–600 people, April 22–26, 2016?
2. Since the conference will feature 3 days of concurrent sessions, do you have available conference rooms in the following configurations?

- three rooms located in the same general area that will hold 100 people
- three additional rooms that will hold 50 participants, with six persons per round table

We will have three concurrent sessions at each time slot—two in the morning and two in the afternoon.

3. Can your hotel provide the following multimedia equipment for each room?
 - screen
 - projector that can be attached to a variety of mobile devices
 - microphones
 - lectern
 - high-speed Internet connection (please specify wired or wireless)
4. Can the seating arrangements be altered in each room between sessions?
5. Can the hotel provide refreshments during the morning break and afternoon break? Can these refreshments be made available at a location that is convenient to the meeting rooms?

continued

Response Deadline

I will need a written response to each question by *March 1, 2015*. Also, please include in your reply a price list and menu for refreshments available for conferences.

If you have any questions, please contact me at 620-231-7000 Monday-Friday. If I am away from my desk, just leave a message on my voice mail and a time when I may return your call.

Sincerely,

Juanita Márquez

Juanita Márquez
ASEE Convention Arrangements Chair

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Case 7-4: Unfavorable News Letter

Nancy Krueger is a highly experienced safety engineer who was interviewed by Novel Engineering. Ms. Krueger was impressive during the visit to corporate headquarters, but the interview team recommended another finalist for the position. Despite Ms. Krueger's exceptional credentials, the second candidate had qualifications that more clearly matched the company's needs. Ritu Srivastava, director of personnel, has to write to Ms. Krueger to explain that a job offer will not be forthcoming.

In this situation, Ritu may call Ms. Krueger to give her the disappointing news, but she will also follow the call with a formal letter. Avoid using e-mail or text messages to deliver bad news. Note that the letter gives reasons for Ms. Krueger not being selected, but the news is not explained in a harsh, critical way. It is intended to announce the bad news in as positive and supportive a way as possible. Notice also that Ritu cushions the bad news with a friendly opening and appropriate compliments. Because Ritu was heavily involved with Ms. Krueger during the application and interview process, she addresses her as "Nancy." Do not use first names unless you really know the person you are addressing. Ritu uses a *modified block format*, which uses paragraph indentions and shifts the date, closing, and signature line to the right side of the page (Case Document 7-4), because she thinks this format looks a little less stiff and formal.

CASE DOCUMENT 7-4

NOVEL ENGINEERING, INC. _____ ESTABLISHED 1954
4415 JUNIPERO STREET
SYRACUSE, NY 13233

May 14, 2014

Ms. Nancy Krueger
1248 Orange Avenue
Valley View, OH 44125

Dear Nancy:

All of us here enjoyed the two days you visited with us two weeks ago. Your perception of our clients' needs indicates that you have a firm understanding of the role safety engineering plays in the local contracts we win and manage.

continued

h 1, 2015. Also, please
shments available for

)-231-7000 Monday-
on my voice mail and

While your background would be invaluable to us, we have only one position available, and we have selected an applicant with international project experience.

As we discussed during your visit, our range of clients has expanded. We now receive RFPs from countries in Europe, South America, and the Pacific Rim. Developing responses to their needs requires us to expand our team, particularly when we can do so with professionals with international experience.

Thank you for considering us. We were genuinely impressed with your professionalism, your analytical skills, and your record as a team player. And I was immensely pleased to have the opportunity to meet you.

Sincerely,

Ritu Srivastava

Ritu Srivastava
Manager, Personnel

Case 7-

Catherine Leigh
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Case 7-5: Claim Letter

Catherine Leigh, a senior at Astoria College, discovers that she has been denied a tuition refund for a course she thought she dropped. As though the monetary penalty weren't enough, she also discovers that she has been given a grade of WF (Withdraw Failing) for the course. This withdrawal on her transcript will hurt the exceptional grade point average (GPA) she has been building for 3 years and makes admission to veterinary medicine almost impossible. She takes her complaint to the dean of Academic Affairs and follows up the face-to-face meeting with a formal letter that explains the problem in detail as well as the solution she is proposing.

Catherine knows that the dean of Academic Affairs has a lot to do and may give the letter to an assistant to investigate the complaint. She therefore doesn't assume that her reader remembers (or even knows) anything more about the case than what she provides in her letter. And she uses headings to help the reader find information quickly. She adopts a block format to make herself look judicious and methodical, and she proofreads carefully so that she doesn't come across as the kind of student who easily makes mistakes.

CASE DOCUMENT 7-5

Catherine Leigh
601 Ocean Avenue
Astoria, FL 34103

September 8, 2014

Dr. Neville Hodges
Dean of Academic Affairs
Astoria College
Astoria, FL 34103

Dear Dean Hodges:

I am writing to give you a written record of the situation I discussed in your office on Friday, September 5. I enrolled in the summer session of Math 3325, in section 001, under the instruction of Dr. Voskovic. I dropped the course before classes started but nevertheless was denied a tuition refund and given a grade of WF.

continued

Description of Events

I registered for Math 3325 in February, but later my plans for the summer changed. I believed that all I had to do was go online and drop the course. I dropped the course online and did not attend any of the class sessions. During the first week of June, I called the registrar for information about my refund check. I asked the woman who answered my call if I had taken care of everything I needed to in order to get my refund check. She asked for my ID number, which I gave her. She then informed me that I should receive my check in the mail shortly. I waited for two months.

I returned to the registration office in person during the first week of August to inquire about the refund check. It was then that I was informed that I was dropped from the course due to excessive absences and I could not receive a refund. However, I was assured that I would get a W on my transcript. I was upset that my tuition for the course would not be refunded, but I was relieved that the incident would not hurt my GPA.

This relief, however, was short-lived. The following day, while I was working on my application to the Florida College of Veterinary Medicine, I discovered that my unofficial transcript online has a grade of WF for Math 3325. This grade will seriously hurt my chances of admission.

My Request

I request that the WF on my transcript be changed to a W and that my tuition for the course be refunded. I sincerely believed that I had dropped the course. My telephone conversation with the registration office only confirmed this belief.

I am a senior honors student with a GPA of 3.63. I fully understand that once a student enrolls in a course, he or she must attend class. I came to Astoria to prepare for a career in veterinary medicine: I would never enroll in a course and not attend it. I hope you will agree that I am conscientious about my studies. Please do not allow this one error to ruin my chances of acceptance to the Florida College of Veterinary Medicine.

I know that the registrar's office is hectic, and I regret that this error occurred. However, given the situation I have described, I do not know how I could have proceeded in a different way. I believe that I did everything I could to drop the course correctly.

Sincerely,

Catherine Leigh

Catherine Leigh
Astoria ID: 418556

Case 7-6

Gabriel Dominguez received an order for an irrigation pump.

Gabriel needed a discontinued irrigation pump, but the only one available was the same as the one Mr. Pickering had ordered. The discontinued pump was the same as the one Mr. Pickering had ordered.

In designing the pump, Mr. Pickering had written a letter by telling the manufacturer that the pump was the same as the one Mr. Pickering had ordered.

(Case Document 7-6) improved models. Gabriel needed to make a pump that was the same as the one Mr. Pickering had ordered.

could call Mr. Pickering to express his concern about the pump that Gabriel had ordered.

forward appeal to the customer and provide information about the pump that Gabriel had ordered.

also put a pump that Mr. Pickering had ordered.

message, Gabriel had ordered.

forthcoming

Case 7-6: Letter of Reply

Gabriel Dominguez owns an agricultural equipment business. He has just received an order and a check from Bruce Pickering, who wants to replace an irrigation pump.

Gabriel needs to notify Mr. Pickering that the pump he has ordered is being discontinued and replaced by two new pumps, both of which are more expensive but are designed to offer better performance. Gabriel wants to be sure that Mr. Pickering doesn't think that Gabriel is simply trying to sell him a more expensive pump when the current model will do the job.

In designing this letter, Gabriel wants to be sure that he does not suggest to Mr. Pickering that he is the object of a bait and switch. Thus, he opens the letter by telling Mr. Pickering that he has the pump and can ship it immediately (Case Document 7-5). However, he wants Mr. Pickering to know that several improved models are available and that he may wish to choose one of the new models. Gabriel then presents all the information he believes Mr. Pickering will need to make his decision and then invites Mr. Pickering to contact him. Gabriel could call Mr. Pickering and talk to him, but in this case a business letter that expresses concern for Mr. Pickering's investment and presents factual information about the alternative pumps will make Mr. Pickering's decision easier. Note that Gabriel chooses the block letter format: he thinks its formal and straightforward appearance will reinforce his credibility and indicate respect for his customer and their business relationship. To give Mr. Pickering the necessary information as soon as possible, Gabriel will prepare the letter with his electronic signature and e-mail it as an attachment; for this important sale, he will also put a paper copy of the letter with his ink signature in 2-day delivery so that Mr. Pickering is confident that everything is official and legal. (In the e-mail message, Gabriel advises Mr. Pickering of the attached electronic copy and the forthcoming paper copy of the letter.)

CASE DOCUMENT 7-6

---Dominguez Irrigation Manufacturing & Supply Co.---

2101 Cerritos Drive
Altair, TX 77412
(817) 569-3766

(date)

Mr. Bruce Pickering
Route 1, Box 41
Silsbee, TX 77656

Dear Mr. Pickering:

We have received your order and check for \$698 as payment for our 15-hp Model XM 21 auxiliary pump. Although we do have several in stock and we can mail one to you immediately, manufacture of this model has ended. We are holding your check and order until we hear from you regarding the following alternatives.

Here is the situation. Purchasers of the 15-hp model have indicated that the low output of this pump is generally insufficient to run the new drip irrigation systems currently being manufactured. This particular pump is not designed to handle extensive operation of these larger systems. As a result, we have discontinued the model. We have reduced the price to \$548 due to our inability to warranty the motor for more than 1 year or supply replacement parts for more than 2 years.

We now manufacture two larger pumps, a 50-hp model and a 75-hp model. The 50-hp model will power a #70 system. The 75-hp model will power a #90 system. Here is a comparison of these three models.

Hypo	Pumps			
Motor	Model	Rating	Warranty	Price
15 hp	21	30	1 yr = 2 pts	\$ 448
50 hp	31	70	full + 5 yr	\$1,795*
75 hp	41	90		\$2,350
*Additional warranty available for \$125/yr.				

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Sincerely

Gabriel

Gabriel I
Owner

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a 75-hp model.
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While we believe that you will be happier with the reliability and efficiency of either of the larger pumps, if you choose to purchase the 15-hp model, we will ship it immediately and refund the \$150 difference in price. I am sending brochures on both new motors. Please look them over and call me at our 800 number, extension 145, if you have any questions. As soon as we hear from you, we will ship you the motor of your choice within 2 working days.

Sincerely,

Gabriel Dominguez

Gabriel Dominguez
Owner

Price

448

1,795*

2,350

CORRESPONDENCE CHECKLIST **Planning**

- ☐ What is your subject, and what is your purpose?
- ☐ What do you want to have happen as a result of your correspondence?
What will you do to achieve your objective?
- ☐ Who are your primary readers? Who are your secondary readers? Do your primary and secondary readers have different needs? How will you satisfy the different needs of all your readers?
- ☐ Why will your readers read your correspondence?
- ☐ What is the attitude of your readers toward you, toward your subject, toward your purpose?
- ☐ If you are addressing international readers, do you understand their cultural practices? What adjustments in your correspondence will their cultural practices require?
- ☐ Will you write an e-mail, text, memo, or letter?
- ☐ Will you choose a direct or an indirect style?

Revision

- ☐ Are your topic and purpose clearly identified?
- ☐ Have you satisfied your readers' purpose in reading?
- ☐ Have you adopted a style suitable to your readers' culture?
- ☐ Have you avoided jargon and clichés?
- ☐ Is your message clear, concise, complete, and courteous?

EXERCISES

1. Civil Engineering Associates (CEA) of Lubbock, Texas, was established in 2009 by Robert Davidson and Walter F. Posey, both graduates of the University of Amarillo. Business for the company was good, and CEA took on six additional partners between 2010 and 2014: Alvin T. Bennett, Wayne Cook, Frank Reynolds, John W. Castrop, George Ramirez, and Richard M. Burke—all graduates of the University of Amarillo.

For the last 5 years, the partners of CEA have met every Friday for a working lunch at Coasters, a local restaurant and bar that features attractive young waitresses wearing provocative swimsuits. The customers are almost exclusively men, and the interaction between customers and waitresses often appears flirtatious.

This year CEA hired Elizabeth Grider, a Missouri State University graduate, as a new partner in the firm. She has attended two of the working lunches at Coasters and finds herself uncomfortable in this environment. She does not feel, however, that she can just skip the lunches because these are the only regular times at which all of the partners gather. Projects are often discussed and work assignments decided at these Friday meetings. In addition, the lunches offer the opportunity to establish a cordial and friendly working relationship with the partners. She realizes that "Friday at Coasters" has become a long-standing tradition at the firm, and she hesitates to upset the status quo. However, she really wishes they could find a better place for their meetings.

As Elizabeth Grider, write a memo to the senior partner, Robert Davidson, explaining the issue with Coasters and recommending one or more solutions. Of course, Grider will speak to Davidson directly but thinks that writing a memo will help her organize her thoughts, anticipate objections, and prepare for a likely difficult conversation. And after their meeting, she will leave the memo with Davidson as a written record of her recommendations.

2. You are the manager of Activ8 Sports in Cleveland, Ohio. Activ8 Sports, a regional chain of 19 athletic equipment stores, has headquarters in Detroit. This morning you received a call from a vice president of the company. The corporate office's social media specialist was doing the usual daily search on Twitter, Yelp, Facebook, etc., for customer comments about Activ8 Sports. She discovered that several of the salespeople at the Cleveland location were using Twitter to make derogatory comments about a coach at a local high school. The coach, a regular and frequent customer at the store, sometimes appears abrupt and aggressive with the salespeople. The vice president directed you to "fix this Twitter thing immediately" and implied your job was at risk. You decide to reprimand each of the salespeople in question. You will also issue a memo for their file as an official warning with a reminder of the corporate policy that proscribes discussing company business in public, including social media.

As the manager of Activ8 Sports, write this memo: try to keep your salespeople cooperative and productive but also make clear that this is their only warning.

You also consider writing a letter of apology to the high school coach before he finds out about the indiscretion of your salespeople. You know that sooner or later he will find out: the comments could easily go viral at the high school. The coach has been a loyal customer, purchasing all uniforms and equipment through your store year after year. You can't afford to lose his business.

As the manager of Activ8 Sports, write to the coach to explain the situation and apologize for the comments of your salespeople on Twitter.

3. Examine Figure 7-4. After Clarion News Service issued this memo to the employees at its Portland location, the hostile reaction was swift. The company was widely criticized in local newspapers for insensitivity to people losing their jobs.

Several city officials accused the company of deceptive communication because, it was claimed, the memo buried important and time-sensitive information in a long paragraph, hoping it would go unnoticed. The criticism of Clarion was picked up by its competitors in the news business and distributed nationally.

If Clarion News Service were to issue a revised letter, what changes would you advise it to make? And, at this point, what other audiences should Clarion address and what other messages should it compose to restore its reputation for ethical business practices?

4. You are special assistant to Jordan Williams, president of Phoenix Engineering Services. He asks you to "check this e-mail message for errors and revise as necessary before distributing," a routine activity for you in your administrative position. This time, however, the message leaves you worried about its practical and ethical implications: it aggressively tries to push more experienced and higher-paid engineers out of their jobs in order to make room for less experienced and lower-paid substitutes (see Figure 7-5). Will this message demoralize and antagonize its recipients? Could it cause a "brain drain" and loss of tacit knowledge at Phoenix? Does this message constitute age discrimination?

What revisions could you make to the wording of this message that would alleviate your anxieties about it? How might you raise your questions about this message without insulting your boss?

5. Adapt the information in Figure 7-6 as a series of 10 one-a-day text messages from the National Park Service to individuals who have made appointments to visit this important site. In addition to a message with directions to the location, compose messages with interesting historical and architectural details that will prepare visitors for a productive and enjoyable tour. To allow the text messages to be recycled later for Twitter, limit each message to 140 characters (including spaces).

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CLARION News Service

MEMORANDUM

TO: Clarion News Service Employees
FROM: Elsa White, VP Operations
DATE: March 16, 2014
RE: Clarion Communications
 702 East Burnside Street
 Portland, OR 97214

In order to increase the efficiencies of our operations and better serve our clients, Clarion will be closing its Portland location on May 15, 2014.

Business considerations and realignments have compelled us to arrive at this carefully considered and irrevocable decision. Please be assured that we are making every effort to provide opportunities for you to grow with us into the future. All Portland employees are invited to apply for positions as a Clarion-at-Home Agent. To learn more about Clarion-at-Home please go to <http://www.clarionathome.com>. Available Clarion-at-Home positions have also been posted for your convenience at <http://apply.clarionathome.com>.

We will be continuing to operate business as usual through May 15, 2014, and we expect you to continue to perform your duties and responsibilities and to act in the best interests of Clarion and our clients with absolute loyalty, dedication, and professionalism.

In case you want to determine if you are interested in Clarion-at-Home, or if Clarion-at-Home is not able to immediately offer you a position, please know that you will have the opportunity to take an Administrative Leave of Absence for up to 30 days. This status will allow your employment to continue uninterrupted along with continuation of any fringe benefits you may currently have. You must notify Employee Relations (ER) or Human Resources (HR) if you elect this option no later than three (3) business days after receiving this notice. Your HR representatives have all the forms and information you need to make an informed decision. Those employees who remain with Clarion in good standing until released will receive any accrued unused PTO, as of the last day worked, May 15, 2014.

continued

FIGURE 7-4 Document for Exercise 3

To answer questions and to assist you as necessary during this time of transition, service representatives from management and ER will be available immediately following the distribution of this announcement. You may also contact Sam Givens, Regional Employee Relations and Training Manager at (555) 742-2500 or SGivens@clarion.com.

In addition, please verify that HR or Payroll has your most up-to-date contact information for tax purposes.

We sincerely thank you for your dedication and hard work and wish you the best of luck in the future.

FIGURE 7-4 *continued*

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From: Jordan Williams, President
To:
Cc:
Subject: Phased Separation Program

I am writing to remind you about Phoenix Engineering Service's Phased Separation Program. The program offers employees who are considering separating from Phoenix the opportunity to scale back their percentage effort to 50% for a designated period, usually three years, while retaining regular employee status, eligibility for raises, and fringe benefits. To view the policy guidelines and complete your application, visit www.phoenix.com/HR/PSP. Human Resources has also prepared a document comparing the benefits of the Phased Separation Program relative to retirement.

I understand that many of the recipients of this message will consider themselves neither ready for nor interested in this program, but I am writing because I think it would be helpful to all employees to learn more about how this program is intended to benefit both those who participate and Phoenix itself.

The Phased Separation Program offers venerable employees the opportunity of a more gradual transition to retirement, which might also take the form of working only half-time each year or full-time for six months of the year, while remaining active members of the Phoenix community.

Funds made available by the program through salary savings to date have been used to invigorate and grow the company. Indeed, this program is in part what has allowed us to hire an unprecedented 16 new college graduates and 24 college interns this year. My hope is that this program will allow us to continue our momentum and do so in a way that primes eager new employees for success here at Phoenix.

This is a rolling program with no deadlines for submitting an application. Please do not hesitate to contact me with any questions or concerns about the Phased Separation Program. I expect you will give it your serious consideration.

FIGURE 7-5 Document for Exercise 4

Eleutherian College Classroom and Chapel Building



Eleutherian College Classroom and Chapel Building
National Park Service

Perched atop "College Hill" in rural Lancaster, Indiana, Eleutherian College was created as one of the first desegregated educational institutions in America. In 1848, Oxford, Ohio, minister Reverend Thomas Cravens started the Eleutherian Institute in Lancaster after being impressed with local abolitionists' enthusiasm during an 1840 visit. The name "Eleutherian" stems from the Greek word "Eleutheros" which means "freedom and equality."

The classes initially met in local meeting halls before construction of the limestone building on College Hill. After moving into its permanent home, the institute changed its name to Eleutherian College and became the first Indiana school to offer post-secondary instruction to African Americans. Soon Eleutherian College built men's and women's dormitories, and annual enrollment reached between 70 and 160 students from 1855 to 1861. During the 1860s and 1870s, when public schools for free blacks became more common, Eleutherian College's enrollment dipped.

Constructed between 1854 and 1856, the surviving Greek Revival-style college building is a three-story stone building designed on a rectangular plan, with a square bell tower above the entrance. Its gable-front roof creates a triangular wood pediment above the school's third floor windows. Finished limestone windowsills, lintels, and corner quoins

offer a contrast to the building's rough-hewn coursed stone walls. The north-facing facade features three bays with two wood doors with transoms around a central window.

The building's interior reflects its original function as a school and chapel. A small entryway situated inside the exterior doors leads to a two-story high chapel with double-height windows running the remainder of the building's length. Two classrooms are located above the entryway on the second story, but the bulk of instruction space, five more rooms, is on the third floor.

Lancaster Township purchased the building in 1888 and used it as a public school until 1938. Restoration projects in the 1960s and during the 2000s have returned the building to its historic appearance.

Historic Eleutherian College, Inc now owns the Eleutherian College Classroom and Chapel Building. It was designated a National Historic Landmark on February 18, 1997.

Plan your visit

Eleutherian College, a National Historic Landmark and part of the National Park Service National Underground Railroad Network to Freedom, is located at 6827 W. State Rd. 220, Lancaster, IN, 10 miles northwest of downtown Madison. Click here for the National Historic Landmark file, text and photos. To reach Eleutherian College, take IN-7 north to SR 260. Head east on SR 220 2.6 miles. The college is situated off the road in the middle of a field. It is open to the public by appointment only. To set up a tour, call 812-368-7281.

FIGURE 7-6 Document for Exercise 5

Source: US Department of the Interior, National Park Service. "Madison, Indiana: Eleutherian College Classroom and Chapel Building." *Discover Our Shared Heritage Travel Itinerary*. http://www.nps.gov/history/nr/travel/madison/Eleutherian_College_Classroom_and_Chapel_Building.html.

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