CHAPTER 4

Communicating in Written Form

This chapter focuses on reading and preparing written messages at work. Many business messages are in written form. Their preparation is a time-consuming task. The ability to read and understand written documents is a vital skill for all types of office workers.

In this chapter, you will learn strategies for improving your reading skills. You will also learn to create effective business documents. You will prepare effective business letters, memos, reports, and related documents.

Online Resources

- The Office Web site: Data Files, Vocabulary Flashcards, Sort It Out, Business Documents, Chapter 4 Supplementary Activity
- Association for Business Communication Baruch College/Communication Studies/Box B8-240 One Bernard Baruch Way New York, NY 10010
- Search terms: speech recognition or voice recognition, merge documents, netiquette, e-mail, business communication

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Most jobs in today’s business world require reading and writing. People have different job responsibilities. A reasonable conclusion, however, is that those who work must have adequate reading and writing skills. In this topic, you will learn to improve your reading skills.

Reading at Work

On many occasions you will need to read on the job. You will find that reading is vital to understanding the total company in which you work. You will also need to read to complete your work tasks.

Learning About Your Company

Employees who want to understand how their work relates to the total company can read about the company in memos, newsletters, and other documents.

WORKPLACE CONNECTIONS

A new receptionist describes how reading helped her learn about her company:

I knew little about this company when I came here to work six months ago as a receptionist/clerk. How could I be able to answer questions of callers if I was completely uninformed about the company? We were introduced to the company and received some brochures about our products during our orientation day. That was helpful, but I wanted to know more. So I asked for copies of the last three annual reports and for any historical information available. I learned we have a small company library. When there are lulls in my work or when I am having coffee in the snack bar alone, I generally find something to read related to the company. I also read every announcement that is sent from the office of the president and other bulletins from our Department of Public Affairs.

Many policies and procedures related to your job will be available in written form. A manager may explain how a particular task is to be done or what policies are to be followed. You will find it helpful, though, to
read the written version of what was presented. You read to have a thorough understanding of what you are to do. From time to time, memos related to ways of doing tasks or changes in policies are sent to employees. Such correspondence should be read and filed for easy reference later.

**Understanding Instructions**

Employees are often provided new equipment and software at work. They must read and follow the written instructions for these items. For example, an employee may need help learning to use speech recognition. The Microphone Wizard, shown in Figure 4-1.1, provides instructions regarding how to position the headset microphone properly.
Businesses develop forms to use in collecting data. You will find forms for such tasks as recording telephone messages, reporting travel expenses, and submitting time reports. Reading all instructions on forms is very important. Try to provide all information requested. If some data are not needed or are not available, a comment should be added. Figure 4-1.2 shows a telephone message recorded on a form. What information did the person who recorded the message fail to add?

**Figure 4-1.2**
A message should include all necessary information to respond to the call.

![Telephone message recorded on a form](image)

**Responding to Inquiries**
Many employees must respond to questions from other workers or customers. The questions will vary. Employees are not expected to know every answer from memory. Employees are expected to know where to find the answers promptly. Once the material is located, the worker needs to read quickly and accurately to find the information.

**WORKPLACE CONNECTIONS**
Linda works in customer services for a mail-order company that sells a variety of items related to books, such as bookcases, lamps, and reading tables. Linda often receives specific questions. For example: “I have a bookcase that is not the exact size as the one you advertise. I need a bookcase to place on top of the one I have. So I need to know what your bookcase’s exact dimensions are. Can you help me?” Linda is able to access the product database quickly and provide the caller with the correct information.
Using Written References/Databases

Office workers use a variety of references. References commonly found in many offices are dictionaries, atlases, telephone directories, and policy and procedures manuals. Data may be stored in databases or other electronic formats. The company may subscribe to online information services. Dictionaries and telephone directories are also available online. You will be expected to become familiar with all sources available and know where to search when requests are made. You will also want to develop references to aid you in your specific duties.

For example, an office worker who takes trips to other countries might need to know about the exchange rate for currencies. This information can be found online. Several Web sites have convenient currency calculators or converters. The office worker might create bookmarks to use in accessing such sites quickly as shown Figure 4-1.3.

Improving Reading Skills

High-level reading skills will help you be more productive at work. For this reason, adopt a positive attitude toward improving your reading skills. Strive for reading skills that are so natural you need not give deliberate attention to the reading task itself. Instead, you can focus on the content of what you are reading. Critical skills for high-level reading are comprehension, vocabulary, and speed.
Comprehension

Comprehension is the ability to understand what you have read. It involves a transfer of information from the printed page or the computer screen to your memory. A simple example is keeping in mind a number that you have just found in the telephone directory. A more complex example is reading about a supplier’s new product and being able to tell whether the product appears superior to the brand your company is currently using. Some techniques you may find helpful as you strive to increase reading comprehension are listed in Figure 4-1.4.

Vocabulary

Your vocabulary consists of words you know and understand how to use. A large vocabulary increases your understanding of what you read. Words that are unfamiliar to you are a barrier to your reading. Certain techniques can expand your vocabulary and help you to be an effective reader. Consider using some of these as you study the content of this book:

1. When you read an unfamiliar word, try to determine its meaning from the way it is used in the sentence. After you have a meaning you think is correct, check the dictionary. If you were right, you will now be more confident as you consider what unfamiliar words might mean.

2. When you read an unfamiliar word, try separating the word into parts to see if you can guess a meaning for one or more of the parts. You read, for example, the word rearrange. You know from earlier experience that rekey means that you must key again. You know the meaning of arrange. You then guess that rearrange means to put in a new or different order. You check the dictionary and find that your guess is right.
3. While reading, have at hand a notepad and pencil to record words you do not know. Write down your best guess of what the word might mean. Also, record the page on which the uncertain word appears.

When you pause to reflect on what you have read, check the words on your list in a dictionary. As you read a definition, compare what you thought the meaning was with the dictionary’s definition. You may want to refer back to the place where the word occurred. Reread the passage and assure yourself that you understand what is being said. If there is more than one definition provided, be sure to select the definition that fits in the context in which the word appeared. Context refers to the parts of a sentence or paragraph around a word that can help you with meaning. You may find it useful to record new words and review your list from time to time. Try using new words in your conversations as a way of reinforcing your new knowledge.

You may find a specialized vocabulary required in your work. You will want to be alert to such terms. You may have available a specialized dictionary or other reference that will help you master new words.

**Speed**

Another aspect of reading skill relates to speed—the time required for reading a passage. Problems with comprehension or vocabulary can slow the rate at which you read. The rate at which you read can merely be a habit. You probably can learn to read more quickly. Some strategies that can be useful in increasing reading speed are described below.

1. Focus your attention on a whole paragraph at one time. Tell yourself, “I want to read this paragraph as a single thought, and I want to know what it says.” By doing so, you are forcing yourself to break a common habit of deliberately pausing at each word or each sentence as you read. When you have finished reading the paragraph, try to summarize it in a sentence or two. If you realize that you have not grasped the meaning, read it once again as quickly as possible. Again, attempt to summarize it. You are likely to improve on your second attempt.
2. Time your reading. Set a goal such as: “I will read this page, which has approximately 350 words, in three minutes.” Check to see if you reached your goal. If you did, try the same passage with a reduced time allowance.

3. Deliberately force yourself ahead as you read. Do not set a specific time goal. Note the extent to which you return to your slower way of reading. Think about why you do not continue reading quickly.

**Reading as a Single Process**

The critical areas of comprehension, vocabulary, and reading speed have been highlighted separately. When you are actually reading, however, these areas interact. In some cases, a weakness in one area may be compensated for by strength in another. For example, you may comprehend well what you read. If you see an unfamiliar word, you figure out its meaning from your understanding of the rest of the sentence or paragraph. You may read rapidly, but your comprehension is limited. By reading rapidly, you have time to reread the material to improve your comprehension. Ideally, you want high skill levels in all three areas.

As you consider the variety of reading tasks you may handle at work, you will come to realize how much good skills are worth. As you complete the varied assignments in your study of office procedures, regularly assess your reading skills and think of ways to improve them.

**Writing at Work**

The extent and nature of your writing duties are related to the nature of your job and your own interest to assume such tasks. All office workers need strong writing skills. Among the common writing tasks are these:

- Summarizing written messages
- Writing notes of actions and decisions at meetings
- Revising others’ writing and making changes
-Preparing communications for others to review
- Composing messages and revising them before they are distributed

Like most activity in business, business writing is purpose driven. A practical reason exists for all writing activity at work. Some of the most common purposes are:

- **Communicating policies and procedures.** People must be informed about the company and their work. Many written messages relate to the policies and procedures in a company.
- **Reporting on plans in progress.** Businesses know that planning for the future is important for success. Meetings are held where workers think carefully about what lies ahead. Written reports are valuable for informing everyone of plans or the progress of various projects.
- **Seeking or giving information.** Detailed data is often required to make a business decision. Messages asking for data may be sent to outsiders and employees.
- **Sending messages to customers.** Companies send messages to customers to encourage greater demand for their products and services.
Letters, brochures, flyers, catalogs, and Web sites all require careful writing. Messages are also required to remind customers to pay overdue bills. Efforts to get payment are done in a friendly manner so that the customer will continue to buy from the company.

- **Following up oral discussions.** Discussions may be in group meetings, person-to-person, by telephone, or by teleconferences. A written record of what was discussed is often required for those in the meetings and for others. Such a report serves as a summary of what happened and as a preview for further discussions.

### WORKPLACE CONNECTIONS

A team of five managers met to consider quality management as it applies to their five departments. These five departments have the most dealings with the public. The purpose of the meeting was to review problems with telephone calls. Customers calling the company’s Customer Support Department had to wait on hold too long before their calls were answered. One of the engineers in the group acted as recorder. He made notes and prepared a report shortly after each meeting. The report was forwarded to the five people on the committee to serve as a record of what had been decided. It also stated where the group would begin at the next session.
Effective summarizing is a valuable skill. To do it well, you should understand what is important to those who will read the summary. You must listen or read attentively and identify the critical points. Write a summary as concisely as possible. Review the summary to see if it actually reflects the written communication or the meeting.

**Reviewing the Writing of Others**

Rewriting is often required to create an effective message. Office workers are often asked to review the messages written by others. Some executives expect their assistants to act as editors. An editor is a person who reviews what has been written to suggest changes in wording, organization, and content. Workers with editorial duties perform tasks such as those listed below.

- Identify precisely what the writer’s intent is.
- Focus on the purpose of the task to ensure that the message is meeting all requirements for effectiveness.
- Make candid suggestions.
- Review their suggestions in an objective manner.

Read the message prepared by a human resources manager shown in Figure 4-1.5. Note the suggested changes made by a colleague. Consider the changes proposed. Do you think they improve the message?

**Composing Messages**

Messages may reflect the point of view of a department or the company. Often, one person is assigned to prepare a draft, which is then reviewed by others. Staff at all levels may participate in writing tasks.

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**draft**: a rough or preliminary version of a written message
In some companies, administrative assistants and secretaries read incoming messages addressed to coworkers. They prepare drafts of responses to the messages. Then the executive reads the incoming messages and the suggested response at one time. Often executives are satisfied with their assistants’ suggestions. Little editing is needed. Final copies can be prepared quickly. Recipients will have responses within a relatively brief period.

You may have complete responsibility for certain writing tasks. You will want to be at ease when you write messages on your own. Little time may be available to get reviews from others and rewrite what you want to say. You will want to develop the skill of writing a message appropriately the first time so little revision is needed. When you are doing the entire job of composing and signing memos and letters, you must be your own editor. If you are objective, you will be a good editor of your own work.

Characteristics of Effective Writing

Messages written for business purposes should contain all the needed information. They should be written in a way that is easy to understand. Unlike a poem, for example, where meaning can be obscure, business writing is expected to be direct and meaningful to all who read it. Common characteristics of good business writing are listed below.

- **Clear.** A clear message is logically arranged with the information in an order that is natural for the recipient to follow. To prepare a clear message, you must know why you want to communicate, what you want to say, and who your recipient will be. A clear message eliminates the need for requests for additional comment.

- **Concise.** A concise message states what you want to say in the fewest and most direct words possible. The recipient will waste no time in reading words and thoughts that add nothing to understanding the message.

- **Courteous.** Written messages are courteous when they conform to the expected polite, considerate behavior of the business world. Expressions such as “thank you,” “please,” and “you are welcome” are commonly used in business correspondence. The so-called *you* approach is commonly recommended for the tone of messages.
Complete. A complete message provides all the information needed. Think of the recipient by asking yourself: “Does this answer all the questions the recipient might raise about this matter?”

Correct. A correct message is accurate and up-to-date. Details provided in messages should be verified before the final copy is prepared.

Read the two messages shown in Figure 4-1.6. Which message is clear? Which message is unclear?

**Figure 4-1.6**  
Example messages

**Message A**
Tell everybody on the team that we’ll meet on Friday morning to discuss plans for the new project.

**Message B**
All members of the Accounting Department will meet on Friday, November 10, at 10 a.m. in Conference Room C. We will discuss plans for updating our Accounts Payable system.

**WORKPLACE CONNECTIONS**

Changes are common in business. Workers should take care to see that all messages have current information. Using incorrect or outdated information can cause problems. Additional messages are often required, and the goodwill of customers can be lost.

Part of Kathy’s job is to answer inquiries about whether products are in stock and when they can be shipped. A customer asked whether a certain product could be shipped at four dates throughout the year. Kathy knew that the company kept good inventories. She responded by e-mail that there would be no problem in meeting the customer’s order. Only after the customer sent the order with the dates for delivery did Kathy check on the items ordered. At that point, she learned that the company would stop making the item within the next two months.

Effective business writing reveals good command of the English language. To create effective messages, follow these guidelines.

- Check sentence structure and be sure all sentences are complete.
- Use proper grammar. Check grammar references as needed and use the grammar check feature of your word processing software.
- Follow rules of punctuation and capitalization. Check reference sources as needed.
- Spell words correctly. Use the spell check feature of your software and have a dictionary at hand. Remember that a spell check program does not find misused words such as “to” for “two” as shown in Figure 4-1.7.
Management of Writing Tasks

Writing tasks must be managed wisely if they are to be completed successfully and on schedule. The management of writing tasks has two aspects. One relates to the actual writing task itself. The other relates to scheduling the task properly to meet deadlines.

Managing the Task of Writing

The following steps will prove useful to you in completing a writing assignment:

1. Identify the reason for the written message.
2. Secure all the information required for the message.
3. Compose a draft of your message. Prepare an outline of what you plan to say if the message is long. Key or dictate your message directly at your computer using your outline as a guide.
4. Review your message; make corrections if needed.
5. If required, submit your draft to a colleague or manager for review and approval.
6. Prepare a revised copy of your message.
7. Proofread carefully.
8. Sign and prepare the final communication for distribution.

Managing the Schedule for Writing Tasks

In most instances, you will have a deadline for the completion of a writing task. This means that when you accept a writing task, you must review how much time is required for each aspect of the work you must do.

One strategy is to review the steps in the preceding section, noting just how much time is needed to do the task well. For example, having the required information at hand in a letter eliminates the need for time to search for information. A schedule may be needed for a major writing task to ensure that you work within the time period allowed. The time available must be scheduled so that each aspect of the task can be done properly.
You will have many occasions during your study of office procedures to develop your writing skills. Remember that all written messages do not need to be of the same quality. For example, a message to the manager of the stockroom, whom you know personally, might be written informally and e-mailed without editing. On the other hand, a letter to thousands of customers might be rewritten several times, with others reviewing drafts to make sure the letter will attract customer attention.

With practice, you will improve your skill in preparing simple messages the first time you try. Also, you will gain a sense of what a good message should be and how to prepare one. With practice, you will develop skill in evaluating and improving your writing.
REVIEWING THE TOPIC

1. Identify several situations that require reading at work.
2. How can you determine the meaning of an unfamiliar word that you find while you are reading?
3. What are the key components of reading skill?
4. Describe a procedure to increase your comprehension of what you read.
5. What might you do to build your vocabulary through reading?
6. In what ways might the speed of reading be increased?
8. What are important skills for a person who is summarizing written messages or meetings?
9. What should a person keep in mind while reviewing a draft of a written communication?
10. Describe a situation where you would prepare a written communication to seek information.
11. For what purpose are written communications prepared after oral discussions?
12. Identify five characteristics of good business writing.

INTERACTING WITH OTHERS

Bea works as an assistant manager in the office of a warehouse facility where she interacts with a number of employees. The office is a busy place because an inventory of over 11,000 items is maintained. On several occasions, Tonia, a part-time employee, asked Bea to help her with instructions for incoming merchandise. Bea began to realize that Tonia, who was still in high school, did not understand instructions. Then Bea began to wonder if Tonia was having problems with reading. One evening after work, Bea and Tonia were leaving at the same time. The two began to talk. Tonia said to Bea: “I think I should give up this job; it is too hard for me. I guess I don’t really want to work.”

If you were Bea, what would you say to Tonia? Write or key your response.
REINFORCING ENGLISH SKILLS

The following sentences have errors in noun and verb agreement. Key the sentences, correcting the errors.

Simple rules of writing applies to e-mail. This type of writing seem informal, but it is still business communications. Experts points out that brisk and brief writing are fine. Considering this type of communicating impersonal is not wise. Insensitive and discourteous statements should not be in your messages. The ease in corresponding via e-mail have led to many unclear and confusing messages. Reviews of e-mail has discovered all types of inappropriate and irrelevant material that are really clutter.

Topic 4-1 | Activity 1

Reading to Answer Inquiries

Assume that you are an agent in the Customer Service Department of a major bank. You spend a lot of time talking with customers by telephone. One area where questions are frequent is early withdrawal costs. The bank’s rules regarding early withdrawals can be accessed on the company intranet.

1. Open the PDF file CH04 Rules from the data files, which shows a portion of the company intranet that contains your bank’s rules regarding withdrawal costs. Read this document carefully.

2. Assume that you respond to calls in which the following questions are raised. Prepare a written response to each of the customers using information you learned from reading the bank’s rules.

**Customer A:** I have an account that has a term of 30 months, which I opened four months ago. I would like to withdraw about half of that money now. What will it cost me to do this?

**Customer B:** My one-year deposit will mature in eight months. Could I withdraw the money next month?

**Customer C:** I have an 18-month account that matures in six months. What penalty do I face if I withdraw all the money now?

**Customer D:** I would like to make an additional deposit to my account that I opened a year ago. May I do this?
Office workers must follow procedures for tasks such as operating equipment and using software. These procedures may need to be documented for the worker’s own reference or for use in training others. Practice writing procedures for a common office task, changing a printer cartridge.

1. Write procedures for changing the printer cartridge on a printer used in your classroom. (Your instructor may need to demonstrate this process.) Title your document “Procedure for Changing Printer Cartridge.”

2. Begin the document by giving the brand name, model number, and type of printer (inkjet, laser, etc.). Give the part or item number that identifies the cartridge and tell whether it is a black or color cartridge.

3. Next, include step-by-step directions for changing the printer cartridge. Review the steps to be sure they are clear, complete, and correct.

4. (Ask for your instructor’s approval before completing this step.) Give your procedure to a classmate. The classmate should attempt to change the printer cartridge following your procedures. The classmate should perform only the actions in your procedures and only in the order you have listed them. Revise your procedures, if needed, using your observations of how successfully your classmate was able to complete the task following your procedures.
Office workers often compose business letters and memos or e-mail messages. Employees may prepare letters or memos for or with coworkers as well as for themselves. The ability to compose and prepare effective business messages will make you a more valuable employee. As you study this topic, you will review document parts and standard formats. You will also study some guidelines for using desktop publishing to prepare documents such as newsletters or flyers.

Preparing Effective Documents

As you learned in Topic 4-1, effective business documents are clear, concise, courteous, complete, and correct. These traits are known as the five Cs of business writing. They are your guidelines to preparing business documents. You can quickly check the effectiveness of your documents by considering these factors.

An effective document is planned well and prepared carefully. Preparing a document includes three stages. First, a draft of the document is written. Then the document is revised or edited as needed. The final stage is proofreading and correcting the document for final presentation.

Drafting

Your first draft of a document will probably not be your final or finished version. It is considered a rough draft. Your goal in preparing the rough draft is to record your ideas. Do not try to make each sentence perfect. You will refine your document during the editing and proofreading stages. To help focus your writing as you develop your document, ask yourself these questions:

1. What is your purpose in writing?
2. What is your message?
3. Who and where is your audience?
4. What response do you want from the reader?

Purpose

Fix the purpose of the document clearly in your mind before you begin writing. Business documents are often written to inform. For example, you may want the reader to know about a new product or a new procedure. Business documents are also written to persuade or describe. Although these purposes may overlap, you need to have a clear understanding of why you are writing the document before you attempt your first draft.
**Message**

Determine the points you need to make. What do you need to say to get your message across? What information do you need to include to build support for your position? The **tone** of your message can be as important as the content. Keep these points in mind as you draft your message:

- Prepare an outline of the document, particularly for longer documents. An outline will help you prepare the message in a logical sequence. The better you organize your points, the easier it will be for you to write the message and for your reader to understand your message.
- Focus on the reader as you write. Avoid using too many “I” and “we” words. Instead, use “you” and “your” frequently. This technique is called the **you** approach.
- Give your message a positive tone. Avoid using negative words or a negative tone. Always be courteous. Make an effort in your writing to be helpful to the reader.
Audience
Knowing certain things about your reader(s) is important to how you develop your document. Is the reader already familiar with the topic? Knowing this will help you determine how much information to include. Is your document going to one reader or to many? Is the document for external or internal distribution? These factors may influence how formal your writing needs to be, whether confidential topics may be mentioned, or how responses may be requested.

Response
How will the reader use this document? To make a decision? To gain information? If you want a response from the reader, let the reader know the specific action you want. Make it easy for the reader to respond by stating your message and the desired response clearly.

Revising and Editing
Many business documents are changed one or more times between the rough draft and the final document. This process of making changes to refine the document is known as editing or revising.

The primary purpose of editing is to make certain the message is accurate and says what the writer intends. In the editing stage of preparing your document, focus on the details of your writing. Read your draft carefully and consider the five Cs of effective documents. Editing is your chance to polish your writing by making changes in response to these questions:

- Can you improve your word choice?
- Are your transitions smooth, flowing logically from one topic to another?
- Should the order of your points be changed?
- Are there inconsistencies in your writing that need to be corrected?

CHAPTER 4: COMMUNICATING IN WRITTEN FORM

Selena, an administrative assistant at a travel agency, wrote this draft:

We are happy to announce that The Traveler’s Agency will now offer a full range of travel services. In addition to our regular travel services, we are now promoting three travel discount packages that we designed for the business traveler. Please contact our offices for more information. Our Web site also provides details.

Selena’s manager reviewed the draft and had these comments: “This draft includes all the needed information, Selena, but the approach isn’t quite right. Please revise the draft using a reader-focused approach.” Selena’s revision met with the manager’s approval.

All your travel needs can now be met through The Traveler’s Agency’s full range of travel services. As a frequent business traveler, you are eligible for special travel discount packages. Three such discount packages have been designed for you, the frequent business traveler. Please return the enclosed postage-paid card to receive more information about these money-saving packages. You can find more details on the Web site.
Proofreading

Proofreading, the third phase of preparing a document, is your careful, overall check of the document. During this process, verify that the changes you marked in the editing phase have been made correctly. Check all numbers and unusual spellings against original documents. Use a spell checker and a grammar checker if available with your software. Then complete a detailed manual proofreading. Remember that the spelling feature of your software is limited in the errors it can identify. For example, errors such as “there” for “their” will not be detected.

WORKPLACE CONNECTIONS

Diego works as an assistant to an engineer who prepares many reports. He has been instructed to prepare rough drafts of all reports. The engineer makes comments and indicates revisions in the document file. After the engineer gives Diego the reviewed file, Diego makes all text and formatting changes indicated. The engineer may revise complex reports several times. Diego’s knowledge of word processing features allows him to make changes easily.

Proofreading

proofreading: checking a document carefully for errors or omissions

Proofreaders’ Marks

Add horizontal space
Align
Bold
Capitalize
Close up
Delete
Insert
Insert quotation marks
Let it stand; ignore correction

or Lowercase
Move left
Move right
Move up
Move down
Paragraph
Spell out
Transpose
Underline or italic

Figure 4-2.1

Proofreaders’ marks are used in editing printed documents.
Proofreading requires your complete attention. Your goal is to produce error-free documents. When a document is very important or complex, you may need to edit and proofread the document several times before it is final.

Message Types

Business messages may be positive, neutral, negative, or persuasive. Each type of message has unique traits that should be considered as you prepare documents. To determine which type of message your letter contains, consider the effect the message will have on the receiver.

Positive or Neutral Messages

A reader will not be disappointed with a positive message or neutral message. For these messages, give the good news or neutral news to the reader in a direct way early in the document. Examples of positive or neutral messages include:

- Placing or confirming an order
- Placing or filling a request for information
- Filling or extending a request for credit
- Making, approving, or adjusting routine claims

To prepare good news or neutral messages, use the direct approach. Go directly to the main point of the message and give specific, complete information. Note how the message in Figure 4-2.2 follows these general guidelines.

Figure 4-2.2
Use a direct approach to prepare a positive message.

Dear Ms. Racine

Congratulations! Your request for a car loan was approved by our loan officers this morning.

Your loan for $10,000 is now being processed and will be available for your use within 24 hours. Please contact our loan officer, Jan Truong, at 555-0134 for an appointment to sign the final papers and to discuss your monthly payments.

Thank you for your business. We are pleased to serve you.

Negative Messages

Negative messages typically involve a refusal or other news that the reader will find disappointing or upsetting. For this type of message, tell the reader why a request is being refused. Give reasons for the disappointing news before stating it directly. Try to keep the reader’s goodwill. Examples of negative messages include:

- Refusing a request for an adjustment, a credit, or a favor
- Canceling a service
- Reporting unfavorable results
Negative messages require the writer to take considerable care in preparing the response. Use the indirect approach. Begin the message with a neutral statement that lets the reader know the message is your response to the request or to a situation that has arisen. Build your position by stating the reasons for your decision. State the refusal or other negative news. Close on a positive note and suggest alternatives if appropriate. Figure 4-2.3 gives an example of a negative message.

Dear Mr. Roberts

Thank you for considering the Trust Bank for your car loan. Our loan officers met this morning to consider your loan application.

After a careful review of your application, they determined that your monthly income must be higher to support a loan of $10,000 with your current debt liability. Therefore, we cannot approve your loan at this time. Please consider resubmitting your loan application once your monthly payments of $250 on your existing loan are finished.

Your patronage is important to us, Mr. Roberts. We at Trust Bank hope you will continue to consider us for your future banking needs.

**Persuasive Messages**

In preparing a persuasive message, the writer wants to influence the reader to take a desired action. Sales letters, collection letters, and donation requests are all examples of persuasive messages. When you write a sales letter, for example, you want to influence the reader to buy your product or service. The basic steps to preparing a sales letter are as follows:

- Gain the reader’s attention
- Stimulate the reader’s interest and desire
- Give the reader an opportunity to act

When you write a collection letter, you are trying to persuade the reader to pay his or her bill. Collection letters are typically a series of letters that move through different stages of persuasion. They begin with a reminder stage. Then they move to a strong reminder stage, an inquiry stage, and an urgency stage. If collection messages are used at your job, you will probably have sample letters available for each phase of the collection writing process.

**Business Letters**

A business letter is a written message to a person(s) or an organization. Letters are usually written to someone outside the company. As the writer of a business letter, you are your company’s representative. Your letter helps the reader form an opinion about your company.
Letters provide a long-lasting record of your message. It can be read many times and can serve different purposes. Reasons for writing business letters include:

- Requesting information or an action
- Giving information or fulfilling a request
- Being courteous or maintaining goodwill (congratulation and thank-you notes)
- Explaining or stating a position or persuading the reader
- Selling goods or services

**Presentation of Business Letters**

The primary purpose of a business letter is to convey a message. However, even before the message is read, the reader makes a judgment about the letter and its sender. An attractively presented letter on quality paper will encourage the recipient to read the message with care. On the other hand, a carelessly presented letter on smudged paper may fail to get close attention.

A letter makes a good first impression if it has the following characteristics:

- The margins and spacing are pleasing to the eye.
- Each letter part is correctly placed within the letter.
- Appropriate stationery is used.
- There are no obvious errors.
- The print is neat and clear.
- There are no smudges or fingerprints.

Make your letters as attractive as possible. If the appearance of the letter is pleasing to the eye, the receiver will be encouraged to read what you have written.

**Letter Parts**

Business letters represent a form of communication within the business world that follows a standard **protocol**. That is, those who receive business letters expect to see them written using certain letter parts. In Figure 4-2.4 on page 135, you will find all the parts that could be included in a business letter. Of course, few letters will include all these parts. Some parts are included in most letters. Other parts are included only when needed. The standard letter parts that should be included in most business letters, as well as optional parts, are listed below.

<table>
<thead>
<tr>
<th>Standard Letter Parts</th>
<th>Optional Letter Parts</th>
</tr>
</thead>
<tbody>
<tr>
<td>Printed letterhead</td>
<td>Mailing notations</td>
</tr>
<tr>
<td>Date</td>
<td>Attention line</td>
</tr>
<tr>
<td>Letter address</td>
<td>Subject line</td>
</tr>
<tr>
<td>Salutation</td>
<td>Enclosure notation</td>
</tr>
<tr>
<td>Body</td>
<td>Separate cover notation</td>
</tr>
<tr>
<td>Complimentary close</td>
<td>Copy notation</td>
</tr>
<tr>
<td>Signature, printed name, and title</td>
<td>Postscript</td>
</tr>
<tr>
<td></td>
<td>Reference initials</td>
</tr>
<tr>
<td></td>
<td>Multiple-page heading</td>
</tr>
</tbody>
</table>
Occasionally, a letter will require more than one page. In such instances, a multiple-page heading is prepared to identify each page. As shown in Figure 4-2.5 on page 136, the heading includes the name of the addressee, the word Page and a page number, and the letter date.

**Business Letter Formats**

The arrangement of the letter text on the page is referred to as its **format**. Using a standard format for letters increases efficiency for both the writer and the recipient. For the writer, extra time is not needed to decide how to arrange the letter. For the recipient, the task of reading and comprehending is simplified because the format of information is familiar.
apply the credit toward a future purchase. Be sure to include your membership number on the account credit form provided and return the form with the questionnaire. This will ensure that your account is credited properly.

Sincerely

Many companies have procedures manuals that contain standard format instructions and examples for frequently prepared documents. If examples are not available, you will be expected to make format decisions. These decisions should reflect your desire to produce attractive, easy-to-read documents.

Writers most frequently use the block and modified block letter formats. In the block format, all lines begin at the left margin; paragraphs and other letter parts are not indented. The letter in Figure 4-2.4 is in block format. Block format is efficient because it saves time in moving from one part of the letter to another.

In modified block format, the date, complimentary close, and signature block (writer's signature, typed name, and title) begin at the horizontal center of the page rather than at the left margin. The first line of each paragraph may be indented one-half inch. The letter in Figure 4-2.6 is in modified block format.

Two punctuation styles are typically used in business letters. These styles are open punctuation and mixed punctuation. In open punctuation style, no punctuation marks are used after the salutation and the complimentary close. See Figure 4-2.4 for an example. In mixed punctuation style, a colon is placed after the salutation and a comma after the complimentary close. See Figure 4-2.6 for an example. Either punctuation style may be used with a block or modified block letter format.

**Repetitive Letters**

Writing in the business office often involves preparing similar messages that are used again and again. The same letters may be sent to hundreds of people. If you prepare such documents, you may want to use form letters and features of your software to speed the preparation.
Standard text can be combined with other data to form a finished document. The writer assembles the document by using custom text (the person's name and address) with selected standard paragraphs. Standard text is also called boilerplate text. Custom text is also called variables. Once the document is assembled, it is printed and saved in the same manner as other documents. A special feature of your word processing software, often called mail merge, may allow you to combine standard text and variables automatically. See Figure 4-2.7 on page 138 for an example. The variable data may be stored in a database file such as a customer address file.
Variables

```
«Title» «First_Name» «Last_Name»
«Company»
«Address»
«City», «State» «ZIP»
```

Merged letter

```
Dear «Title» «Last_Name»

Thank you for returning the customer survey so promptly. The information you provide will help us serve you better.
```

Field names from a database are entered as variables. The main document is merged with the database to create personalized letters.

WORKPLACE CONNECTIONS

Miguel often prepares mailings for groups of customers. The customer name and address information is stored in a database file. Miguel sorts the data or creates a query to find just the customers he needs, such as those in a particular city or ZIP code. He then uses the merge feature of his word processing software to create a personalized letter for each customer on the list. Using the merge feature saves a great deal of time. It also ensures that the customer addresses are accurate because the addresses do not have to be rekeyed. The merge feature can be used to create an envelope for each customer.
Envelopes

Most business letters are written to individuals outside the company. They require an envelope for mailing. The receiver begins forming an opinion of the document when he or she views the envelope. For this reason, the same care should be used in preparing envelopes as in preparing letters. The letterhead stationery and the envelope stationery should be of the same quality and color. The print should be clear, and the envelope should be free of smudges.

The envelope must be of a proper size and material acceptable to the United States Postal Service (USPS). To ensure prompt delivery, envelopes should include the following information:

- The recipient's name and address
- The sender's return address
- Special addressee notation, if any
- Special mailing notation, if any

The USPS recommends using all capital letters in the address. Omit punctuation marks except the hyphen in the ZIP code. Nonaddress data, such as a customer number or attention lines, should appear at the top of the address. Place special mailing notations, such as REGISTERED MAIL, below the stamp area as shown in Figure 4-2.8. Place special addressee notations, such as CONFIDENTIAL, just below the return address. If you have questions about addressing mail, contact your nearest Postal Business Center. You can also find help online by accessing the USPS Web site.

![Envelope for a business letter](image)
Memos

A memo is an informal document. It is typically used to communicate with people within an organization. A memo is more formally called a memorandum. Memos are useful for giving the same information to several people. They can be used to give instructions or explain procedures. A personnel director, for example, may send memos to tell employees of holiday schedules. A credit manager may send memos to sales staff giving new credit terms for customers.

A memo may be printed on memo stationery. Plain paper with the company name and headings as part of the document can also be used. An example is shown in Figure 4-2.9. Memos can be created using a memo template or
wizard available in word processing software. A special slogan or logo may be used on memos that provide updates on special events sponsored by the company.

The headings and body are the standard parts of a memo. Other parts, such as copy or enclosure notations, are optional. When a memo is sent to a large group of people, do not list all the recipients after the To heading. Instead, enter Distribution List after the To heading and list the recipients at the end of the memo under the heading Distribution List.

If the person receiving a printed memo is located nearby, the memo may be placed in the person’s in-basket or mailbox. In this case, an envelope may not be needed. If the receiver is in a different location, the memo typically is sent in an interoffice envelope. A confidential document should always be placed in an envelope marked Confidential.

Each memo you write makes an impression on the receiver. If the memo is prepared well, the reader forms a positive image of you as an employee. When preparing a memo, follow the five Cs of effective writing and use a positive tone. Notice how the message that is written in a positive tone in Figure 4-2.10 sounds courteous while the message written in a negative tone does not.

![Figure 4-2.10](image)
The tone of a message can be positive or negative.

### E-Mail

E-mail is a message sent electronically. Local and wide area networks can provide e-mail service to their users. Users who are connected to the Internet can send and receive messages all over the world. Workers use e-mail for routine messages with people inside and outside the company.

E-mail is appropriate for short, informal correspondence. Files containing more information may be attached to an e-mail. E-mail is inexpensive, fast, and easy to use for workers at all levels in a company. Remember, however, that e-mail messages are recorded. They may be viewed by people other than the person to whom you wrote. Your e-mail may be read by your employer or by coworkers. At work, never write an e-mail message that you would not want other employees or your supervisor to read.
E-Mail Addresses

Before you can send and receive e-mail, you must have a unique e-mail address. E-mail addresses begin with a user ID (identification). The ID is a unique identifier such as dsmith (for Diane Smith). The user ID is followed by the @ sign and the domain name. To understand a domain name, read from right to left. The highest level of the domain appears at the right and identifies the type of organization. Consider the address dsmith@eng.unlv.edu. Starting at the right, the edu identifies that this address is located at an educational institution. The next section, unlv, identifies the specific one, such as University of Nevada, Las Vegas. The eng identifies the department, such as English or Engineering. The last part, dsmith, identifies an individual.

When you pronounce an e-mail address Djones@cmu.com, you would say “d jones at c m u dot com” rather than spell out each letter. Be careful when recording an e-mail address. Addresses are often case sensitive. If you key an address incorrectly, your message will not be delivered to the intended address.

E-Mail Features

E-mail software varies somewhat in look and features from one package to another; however, certain features are found in most e-mail packages. E-mail messages contain headings and a section for the body of the message. An example is shown in Figure 4-2.11. E-mail programs allow the user to read mail, check for new messages, compose and reply to messages, delete messages, attach files to messages, and send new mail.

An e-mail address book is provided to store the user’s most frequently used addresses. The Inbox collects incoming messages. A user alert, such as a tone or flashing icon, often accompanies the receipt of new mail. The Outbox holds e-mail messages to be sent to others. It may also hold messages that have already been sent, or these messages may be stored in a separate
Sent box or folder. Because these messages are actually stored on your hard drive, you should frequently delete messages that are no longer needed. Most mail programs will allow you to prioritize an e-mail message, that is, to rank it in importance, usually from urgent or high to low.

Improving Communications in Organizations

Memos and e-mail are the most commonly used written messages within an organization. Memos should be used to provide confidential information. Memos can also be used for messages to workers who do not have access to e-mail at work, such as factory workers. E-mail is appropriate for many short, in-house messages. You should follow the same proper writing techniques for memos and e-mail as you do for your other messages.

Memos and e-mail messages should be written clearly and concisely. Often the message must be written under time pressure because of the need for prompt decisions or sharing of information. Take care to prepare an accurate, well-written message even though it is created quickly and the tone of the message is less formal than in a letter.

Consider these guidelines for improving memos and e-mail messages:

- Keep the message short. Attach a report to the message if more details are needed.
- Use a descriptive subject line so the recipient can see immediately the topic of your message.
- Follow a logical sequence in presenting the information.
- Write using a positive tone. Be tactful when expressing personal opinions in your writing. Handle sensitive situations positively.
Follow the same strategies as you would for a business letter to deliver positive, neutral, negative, or persuasive messages.

- Carefully read your message, checking for application of the five Cs. Is the message clear, concise, complete, correct, and courteous?

- Use the spell check feature of your software and proofread carefully. When communicating online, observe proper netiquette.

- Check for messages regularly and reply to your messages promptly. Do not, however, send a message quickly in frustration or anger that you may regret later.

- Send messages only to people who really need to read the message. When replying to a message, reply only to the sender—not to everyone who received the message—unless everyone needs your answer.

- Take steps to safeguard confidential information. Never send confidential information in an e-mail message. Prepare a memo or printed report instead.

- Consider carefully before forwarding messages you receive to others. Honor others’ rights of privacy. Never forward chain messages or send spam.

**Desktop Publishing**

Not all business correspondence follows standard formats as letters do. Product brochures, newsletters, and flyers may each use a unique format and design. These documents often contain graphics (clip art, photos, or other images) as well as text. They may use fancy fonts or banner headings to draw the reader's attention. Word processing or desktop publishing software is used to create these documents.
Desktop publishing programs, such as *QuarkXPress®* and *PageMaker*, contain features for creating complex documents with text and images. These programs allow the user to control type settings, such as kerning. They also allow full-color output. The text and images appear on your computer screen almost exactly as they will when printed. The images are often created or edited with programs such as *Adobe® Illustrator®*, *CorelDRAW®*, and *Adobe® Photoshop®*. They are then placed in the document using the desktop publishing program. Word processing programs usually have basic desktop publishing features. Programs such as *Word* may be used to create documents with multiple columns, text, and graphics.

**Resolution**

True desktop publishing results in high-resolution printed documents. Printed text and images are made up of many tiny dots of color. Resolution is the number of dots per inch (dpi) in a printed document. The greater the dpi, the higher the resolution and the sharper the printed image. Professional printers use around 2,400 dpi for many documents. Many businesses do not have high-resolution printers. They create the document files and send them to an outside company for printing. For in-house or informal documents, 600 dpi is considered acceptable. Many businesses have printers that can produce this resolution.

**Desktop Publishing Guidelines**

When creating documents to be desktop published, follow the five Cs of effective writing. Consider the purpose of the document. Is it to inform, to persuade, to request information? Also consider the audience for the document. Is in-house (probably low-resolution) printing acceptable? Should a professional printer be used? If printing will be done by a professional printer, obtain details from the printer about how the file must be created to print successfully. Use copyrighted text or images in your documents only with proper permission from the copyright holder.

Your goal is to create a document that makes a good impression. It should be attractive and deliver your message effectively. Consider these guidelines for creating desktop published documents:

- Use consistency in the design. For example, format all heads of the same level in the same way. If the company logo appears on each page, place it in the same location on every page.
- Use ample white space to rest the eye and identify the beginning and end of sections. Effective use of white space keeps the text and images from looking cramped on the page.
- Create a pleasing balance of elements (headings, body text, and images) on the page. Documents with a balanced format (with roughly the same amount of material on each side of the page) have a formal, traditional look. Documents with an unbalanced format have a more informal look.
- Create contrast in the design by placing different objects next to each other. A graphic placed next to text, for example, creates contrast on the page.

**kerning**: adjusting the space between characters in text  
**resolution**: the number of dots per inch (dpi) in printed text or images  
**white space**: the area of a printed page that is empty, having no text or images

Topic 4-2: *Business Correspondence*
Include artwork or photos that are relevant to the message. Place them near the text to which they relate. Use decorations or other artwork that are appropriate for the document. Take special care in very formal or serious documents that any artwork used is in keeping with the formal tone of the document.

Use fonts that are easy to read. Limit the number of fonts in the document to two or three. Use bold, italic, and different sizes to vary the font appearance. Do not use font sizes that are too small to read easily.

Use all capitals sparingly because text in all caps is hard to read.

Avoid widow lines. Adjust the spacing or rewrite the sentence if necessary to prevent widow lines.

Use printer’s curves for apostrophes and quotes (‘ and “ rather than ’ and ”).

Avoid large horizontal spaces between words, which look unattractive. Using a ragged right margin and hyphenating words helps avoid this problem.
REVIEWING THE TOPIC

1. Describe the five characteristics of an effective document.
2. When creating the first or draft copy of a document, what four factors should you consider to help focus your writing?
3. Describe the three categories of messages common in business correspondence.
4. How can a writer use a reader-based approach in writing?
5. What reader characteristics are important for the writer to know?
6. Contrast the strategies used in preparing positive messages and negative messages.
7. What letter parts should be included in every business letter?
8. Identify the characteristics of a letter that make a good first impression.
9. Why do businesses use standard formats for their business letters and memos?
10. What is the purpose of a memo? How does it differ from a letter?
11. For what purposes are e-mail messages used?
12. List four guidelines that you think are the most important ones for improving written communications within an organization.
13. Define desktop publishing.
14. What is print resolution? How does it relate to clarity of printed material?
15. List five guidelines to follow when creating desktop published documents.

INTERACTING WITH OTHERS

Guidelines for interacting with others courteously online are called netiquette (derived from network and etiquette). Prepare a flyer on netiquette related to e-mail to distribute to coworkers.

1. Search the Internet or other reference sources for several articles or Web sites that provide information about netiquette. For each article or Web site, record the source information. Include the author for articles, the article or Web page name, the publication or Web site name and address, and the date of the publication or the date you view the Web site.
2. After reading about netiquette, write in your own words a list of eight to ten netiquette rules that relate to e-mail.
3. Create a one-page flyer to communicate your netiquette rules.
Follow the design guidelines found in this chapter for creating effective documents.

4. List the source information for three articles or Web sites you reviewed as sources of additional information on netiquette.

**REINFORCING ENGLISH SKILLS**

A coworker at Computer Corner Furniture needs your help with answering a letter to a customer. The customer has had difficulty assembling a computer workstation. The tone of the response written by your coworker is too negative.

1. Open the Word file CH04 English from the data files. Revise the excerpt from the letter to give the message a more positive tone.
2. Spell-check, proofread, and correct all errors before printing the message.

---

**ACTIVITY 1**

**Form Letters**

A draft of a letter to be used as responses to routine inquiries for employment has several errors in spelling, capitalization, and word usage. These errors must be identified and corrected before the form letter is merged with the data source.

1. Open and print the PDF file CH04 Letter found in the data files. This file contains handwritten text to be used as standard text for a form letter.
2. Key the standard text for the form letter. Assume the letter will be printed on company letterhead. Use the current date, block letter format, and open punctuation. Add an appropriate salutation and closing. Correct errors as you key; then spell-check and proofread the message. Save the letter as CH04 Form Letter.
3. Create a new database file named CH04 Contacts. Create a table named Contacts that contains the following fields: Record ID, Title, First Name, Last Name, Address, City, State, ZIP Code, and Position. Make Record ID an AutoNumber field and the primary key. Make all other fields text fields.
4. Enter data for the five records as shown on the following page in the Contacts table. (The AutoNumber field data will be entered automatically.)
Mr. Tomas Perez, 298 Apple Lane, Springfield, MO 65804-1189, administrative assistant
Ms. Alice Lamson, 19 Talley Street, Englewood, CO 80111-7825, accounts payable specialist
Mrs. Mabel Jones, 339 Hogan Street, Topeka, KS 66612-1045, order entry associate
Mr. Ken Hinrichs, 809 Northsky Square, Cupertino, CA 95014-0692, customer service representative
Mrs. Emiko Yung, 56 Barrow Road, Westerville, OH 43081-2243, secretary

5. Open the standard letter (*CH04 Form Letter*). Select the *Access* file *CH04 Contacts* as the data source for a mail merge. Enter fields from the database for the variables. Complete the merge steps to create personalized letters. View the merged letters and make corrections, if needed, before printing the letters.

6. Perform a merge to create personalized envelopes for the letters. Edit the merged envelopes so the addresses are shown in all capitals. Remove all punctuation except the hyphens in the ZIP codes. Make other corrections, if needed, before printing. (Use paper cut to envelope size if envelopes are not available.)

**Topic 4-2  ACTIVITY 2**

**Standard Letter Format**

Assume that you work for Western Security Systems. After several meetings, the support staff has recommended that a modified block style letter with mixed punctuation be adopted as the company standard for all business letters. You have been asked to provide a sample of the modified block letter format. You decide to use the body of the letter to describe the format and punctuation style so that everyone will understand how to prepare letters using this standard format.

1. Compose and key a sample modified block letter with mixed punctuation. Use the following information for the address and supply an appropriate salutation. The letter is from you, and your title is Administrative Assistant.

   **Address:**
   - Customer’s Name
   - Street Address
   - City, State ZIP

2. Create a memo form for Western Security Systems. Include the company name and heading lines to print on plain paper. Prepare a memo to all employees asking them to begin using modified block format for all letters. State in your memo that you are enclosing a sample letter as an example.
Business reports are used to share information. Reports may be prepared for employees or people outside the company. The type of reports workers will prepare will depend on their job duties. In many companies, office workers write, edit, assemble, and distribute business reports.

Reports can be prepared in various formats and for various reasons. You will explore reports with different purposes in this topic. In addition, you will explore special features of reports such as tables and graphs. You will learn to gather, organize, write, and present information in a standard report format. You can easily adapt this format to other reports you may encounter on the job. Reports can be saved as Web pages and shared with others using an intranet. You will practice saving reports as Web pages.

**Informational Reports**

Informational reports are typically based on data gathered within the normal operations of the company. Standard report forms may be used to gather the data for such reports. The company relies on employees to complete the forms accurately and neatly. Using printed forms saves time and ensures that data are collected in the same way by all users.

**WORKPLACE CONNECTIONS**

Louisa Ramos works as an administrative assistant in a small insurance company. One of Louisa’s duties is keeping track of the office supplies, which are stored in a central location. Every month she prepares a report for her supervisor. The report gives a summary of the supplies used and those ordered as replacements. Employees who remove supplies from storage are supposed to let Louisa know what materials have been taken. Some employees leave a note on Louisa’s desk. Others send her an e-mail or voice mail message, and yet others leave a note in the supply cabinet. The messages are often incomplete. They may leave out the quantity or a clear description of the supplies removed. Louisa realized she was spending a lot of time asking employees for complete details about the supplies removed as she prepared her report each month. “This system just isn’t working. There has to be a better way,” Louisa thought.

Louisa created a form with spaces for an employee to record his or her name, the current date, code numbers for the supplies removed, and the quantity of the supplies removed. The forms are kept in the supplies closet. Each employee who removes supplies now completes a form and leaves it in a specially marked tray on Louisa’s nearby desk. Using the information from the supplies forms, Louisa can now create the monthly report quickly.
In many companies, routine reports are created on a regular basis. Procedures for gathering data needed to write these routine reports may be in place. For example, the form shown in Figure 4-3.1 is used to collect data about copier problems. A completed copier repair form is submitted each week. An employee uses the weekly reports to write a repair summary report. One of the purposes of this report is to spot high maintenance trends and to anticipate when major maintenance will be needed on a copier. The two-page memo report follows the same format each week. The similar data are summarized for each report using designated headings. The employee then adds comments at the end of the report.

Some companies use handheld computers to gather data that are later used to create reports. For example, utility company workers use devices to read meters that monitor use of electricity. The data gathered are copied to a central computer. Office workers use the data in creating reports and customer bills.

When writing an informational report, follow the guidelines used for a direct message. State the purpose early and clearly. For example, use the subject line in a memo report or the title in a formal report to help focus the reader to your purpose.
Consider the audience in deciding how formal a report should be. Consider whether to use technical terms or confidential information. Make certain the reader knows why the report is being written. State clearly the response or action required. Provide complete and correct supporting data. Write the report in a positive tone.

Organize the report by outlining the points that should be covered. If you are expected to follow a standard format, the organization is already determined. If, however, you can develop your own reporting format, organize your thoughts around a logical way.

Present only data that relate to the topic of the report. Do not clutter the report with unnecessary data. You may be expected to add your own comments or interpretations to the data. Identify these comments clearly. Writers often use headings such as Comments, Recommendations, or Implications for their analysis and comments about the data.

Give attention to the formatting and final presentation of the report. The report represents you or your company. It can make a positive or negative first impression affecting how the content of the report will be received.

**Analytical Reports**

Analytical means involving detailed study. An analytical report is generally a longer, more complex report than an informational report. Such a report is normally prepared as a formal business report. It often requires much research and information gathering. An analytical report takes more time to write and may require in-depth analysis of situations to persuade the reader.

The data presented in an analytical report are often used to make important company decisions. Typically, an employee is asked to research a specific problem or situation. Several employees may work in a group to research and write the report. The employees gather data related to the problem. Then they write a report that presents the data they have collected. The report may also include interpretations of the data. The writers are often expected to draw conclusions and make recommendations.

**Gathering Data**

Reports are often completed under the pressure of deadlines. Employees are expected to gather data quickly and accurately. You may be asked to contribute to a formal business report. These guidelines will help you gather and process data quickly, accurately, and with attention to detail:

- Record complete source details for all data you locate. Include the title of the publication or Web site and address, author, publisher, date, and page.
- If information must be keyed during the data-gathering stage, key it as it is collected.
- If information must be recorded manually, use note cards to allow for ease in rearranging the data while writing the report.
- Use a scanner with optical character recognition (OCR) software, if available, to reduce the amount of time needed to enter large quantities.
of previously keyed data. If scanning is not possible, photocopy the material (such as tables) to be sure that the details are accurate.

- If your duties include creating many reports, consider using **speech recognition software** to speed data entry. A typical office worker might enter text using the keyboard at 50 words per minute (wpm). After a little practice using speech recognition software, the same worker could probably dictate text at 130 wpm.

- If a document has sections that are often repeated, save time by using boilerplate text.

- Use tablet PCs or handheld computers to collect data as an alternative to keying data. These devices allow the user to handwritten notes on a touch screen or scan bar codes. The handwriting can be converted to text and downloaded to a desktop computer. This process can be much faster than recording data manually on note cards or forms and then keying the data.

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**WORKPLACE CONNECTIONS**

Stan Bridge works for a package delivery service. He uses a handheld computer device to gather data. When each package is delivered, Stan scans the package bar code label that identifies the package and the delivery location. The customer signs for the package entering his or her signature on the touch screen of the computer device. At the end of each day, Stan places the handheld device in a unit that allows the data to be downloaded to a computer. The data are used to create a report that shows the number of deliveries Stan made that day, the number of pounds the packages weighed, and the types of items (overnight letters, small packages, large boxes) delivered.

The data collected by several drivers are also used to create reports. These reports address issues such as how long a route various drivers should be assigned. The number of drivers needed in a particular delivery area might also be discussed.
Researching Information Online

The Internet and private information services provide access to data that can be used in reports. Many of the sources available on the Internet are free for all users. Private information services, however, usually charge a connect fee. They may also charge according to time used or the number of searches made. Many businesses find using an information service more efficient than using staff time to search for data.

By using the Internet or an information service, data can be searched quickly. Company financial profiles, investment advice, text of magazines and journals, U.S. Census data, and government regulations are a few examples of the data that can be found.

Writing the Report

When report data have been gathered, organized, and analyzed, you are ready to begin writing the report. As a writer, you will need to consider and use an appropriate tone and degree of formality in the report. If the report is for your coworkers, an informal style may be used. If the report is for a broad audience or outside the company, however, your writing style should also be more formal. Read the examples in informal and formal styles in Figure 4-3.2.

Voice Recognition Systems

Voice recognition systems allow users to input data by simply talking to a computer. This process is also called speech recognition. As the user speaks into a microphone, the spoken words appear on the computer screen. Current software versions allow the user to speak up to 160 words per minute with 95–98 percent accuracy. This type of software has improved greatly in recent years. Voice input is now a practical alternative to keyboarding.

Using voice input helps workers be more productive. Data are input directly in one step rather than recorded on tape and then keyed later by the same or another person. This process reduces the time needed for the work to be completed.

It also reduces the need for outside transcription services.

Using voice input reduces the need for clicking a mouse. Many commands can be given by voice instead. Documents, databases, or the Internet can be searched using voice commands. This can help reduce the instances of repetitive strain injuries, such as carpal tunnel syndrome.

In the future, more programs for voice input will be developed for portable and wireless computer devices. Small, handheld units will allow workers to use voice input when away from the office. Such upgrades will provide greater freedom and higher productivity for users.
Use a formal style when the report will be read by a larger number of people or when the topic is complicated. To achieve the formal style in the second example, note that the writer

- Did not use first names (*The Board of Directors* vs. *Jason*)
- Did not use contractions (for example, *you’re* or *I’m*)
- Used **passive voice** (*were determined* vs. *report contains*)

Use the general guidelines presented in Figure 4-3.3 on page 156 to begin creating the report. If several drafts of the report are required, cycle through step 4 as often as revisions are required. These steps are common to all business reports.

**Distributing or Posting Reports**

Once a report is completed, you may need to make one or more copies and deliver or mail the report to persons who need it. You will learn about copying documents in Chapter 10 and about mail delivery services in Chapter 11.

A report might be sent as an attachment to an e-mail message. Reports that are prepared to be used in printed form may also be posted on a company intranet. Word processing and spreadsheet programs have features and commands that allow documents to be saved as Web pages. Always preview the document in a Web browser to check the format before posting. You may need to make adjustments to the layout of documents saved as Web pages.
Business Report Formats

Several acceptable formats are can be used for business reports. Your company, however, may have a preferred format. Look at previous reports or a company procedures manual to see formats that have been used for reports. Two common business report formats are the unbound and leftbound formats.

An unbound report is fastened in the upper left-hand corner with a paper clip or staple. No extra space is provided in the margin for fastening the report together. This format is useful for short reports that will be distributed internally.

In a leftbound report, the left margin contains one-half inch of extra space. The extra space allows for binding the report at the left. All other margins are the same as those of the unbound report. Writers use this format for longer, more complicated reports. Leftbound format is also useful for reports that require a formal presentation or are being sent outside the company.
The formats presented to you in this topic represent acceptable business report formats. Refer to Figure 4-3.4 for a summary of report formatting guidelines.

### Business Reports Formats

<table>
<thead>
<tr>
<th>Format</th>
<th>Top Margin</th>
<th>Bottom Margin</th>
<th>Left Margin</th>
<th>Right Margin</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unbound</td>
<td>2 inches</td>
<td>1 inch</td>
<td>1 inch</td>
<td>1 inch</td>
</tr>
<tr>
<td>First page</td>
<td>2 inches</td>
<td>1 inch</td>
<td>1 inch</td>
<td>1 inch</td>
</tr>
<tr>
<td>Other pages</td>
<td>1 inch</td>
<td>1 inch</td>
<td>1 inch</td>
<td>1 inch</td>
</tr>
<tr>
<td>Leftbound</td>
<td>2 inches</td>
<td>1 inch</td>
<td>1.5 inches</td>
<td>1 inch</td>
</tr>
<tr>
<td>First page</td>
<td>2 inches</td>
<td>1 inch</td>
<td>1.5 inches</td>
<td>1 inch</td>
</tr>
<tr>
<td>Other pages</td>
<td>1 inch</td>
<td>1 inch</td>
<td>1.5 inches</td>
<td>1 inch</td>
</tr>
</tbody>
</table>

The body of the report is usually double-spaced, but it may be single-spaced.

### Formal Business Reports

A formal business report includes standard parts. These parts help readers understand the report. A formal report generally explains the reason for the report. The report data and an explanation of their meaning follow. Conclusions or recommendations are given last. The writer also documents the sources of information used to write the report. A formal business report may contain all or some of the common report parts. Typical report parts used in a formal business report are listed in Figure 4-3.5 on page 158.

### Report Pagination

Pagination is the process of dividing a document into individual pages for printing. Page breaks are set by the software as the page is filled. These breaks are called soft page breaks. When revisions are made, the page endings will change and the pages will be renumbered automatically.

The user can enter a command for a page ending. This type of page ending is called a hard page break. This page ending will not shift when edits are made to the document. A hard page break is useful for beginning a new chapter or section of a report. A hard page break can also be used to prevent paragraphs from dividing. Paragraphs divided between pages should contain at least two lines on each page. A first line of a paragraph printed by itself at the bottom of a page is called a widow line. The last line of a paragraph printed by itself at the top of a page is called an orphan line. Avoid widows and orphans by reviewing the page breaks in the report and adjusting them as needed. Your word processing software may allow you to set options that help prevent widows and orphans.
Use the automatic page numbering feature of the software to number report pages. The title page of a report is considered page 1, but it should not display a page number. Pages coming before the body of the report, such as a table of contents, are numbered with lowercase Roman numerals. The numbers are centered in the page footer. Pages in the body of the report, the references section, and any appendices are numbered in the header at the right margin. See Figure 4-3.6 on pages 159 and 160 for examples of page numbers.

**Report Headings**

The main heading is the title of the report. Use the heading to introduce the reader to the report’s topic. Give the heading a prominent position in the report by using capital letters and bold type, a slightly larger type size, or a different font style. The Title heading style of the word processing
software can also be used to format the title. The secondary heading, if used, provides additional information. If a secondary heading is used, give it less prominence in your report than the main heading. Capitalize only the first letter of key words. Use the same font style, perhaps in a smaller size, as used for the main heading.

Use side headings to divide the main topic into subdivisions. Key side headings in capital and lowercase letters on a separate line beginning at the left
margin. Insert a blank line before and after each side heading. Use bold or the different font style used for the main and secondary headings for emphasis. Default heading styles in the word processing software can be used to format report side headings. When these heading styles are used, the word processing software can generate a table of contents for the report that includes the headings.

**Report Documentation**

Giving credit to the sources of information you used in a report is called documentation. One common method uses endnotes. When the endnote method is used, a superior (raised) reference figure is placed at the appropriate point in the copy. The matching numbered reference is then listed at the end of the report in a section titled *ENDNOTES*.

*When writing the report, credit must be given for material quoted either directly or indirectly from other sources.*

If using endnotes, use the footnote feature of your software to create the endnotes. If text that contains an endnote reference is moved, the endnotes will be renumbered. Endnotes numbers will also be adjusted when new endnotes are inserted.

Another common method uses textual citations. When the textual citations method is used, part of the source information is placed in parentheses within the text. This information includes author(s), date of publication, and page number(s).

*When writing the report, credit must be given for material quoted either directly or indirectly from other sources (Tilton, Jackson, and Rigby, 2005, 395).*

If the source is identified by name within the report copy, only the publication date and page number are used.

*According to Tilton, Jackson, and Rigby, credit must be given for material quoted either directly or indirectly from other sources (2005, 395).*

The matching reference is listed at the end of the report in a section titled *REFERENCES* as shown in Figure 4-3.6. The entries are listed in alphabetical order by the author’s last name. Entries are single-spaced in hanging indent format with a double space between them. Each reference should provide all the data needed for the reader to locate the source. Data included will vary depending on the type of source. Consult a current reference manual for example entries. The company may identify a reference style or guide that employees should use. Examples of reference manuals include:

- *The Chicago Manual of Style*
- *How 10: A Handbook for Office Workers*
- *MLA Handbook for Writers of Research Papers*
- *Publication Manual of the American Psychological Association*
Memo Reports

Short, informal reports are often prepared in memo format. The subject heading is used to identify the topic of the report just as the main heading is used for an unbound report. Side headings, like those used for unbound report format, may be used to identify sections of the report. Side headings are shown in Figure 4-3.7.

A memo report frequently has more than one page. In such instances, the page number is part of the heading that appears on all pages after the first page. Review multiple-page headings in Figure 4-2.5 on page 136. Use the header feature of your word processing software to automatically print the page number and the rest of the heading at the top of succeeding pages.

Figure 4-3.7

Memo report example

Office Communications Consultants

TO: Alma Yang, Manager
FROM: Alberto Diaz
DATE: August 5, 20--

SUBJECT: MARKETING AND THE INTERNET

Internet use is growing quickly. Currently, approximately 804.1 million people worldwide use the Internet. One of the primary uses of the Internet for many consumers is shopping online. More and more companies are selling products, providing customer support, and doing market research via Web sites.

Market Research

Marketing research firms make data available in a variety of forms for business needs. They focus on the customer and the market. Marketing research firms use questionnaires and interviews to gather information about consumer behaviors and attitudes. They also look at marketing trends and collect valuable demographic data.

Computer technology makes it possible for researchers to collect a variety of data, analyze huge amounts of information, and forecast market conditions. For example, customers who buy online typically provide information about themselves to the company. This information is called a customer profile. Companies may also build their store of information about online customers by using cookies. Cookies are messages exchanged by the user’s Web browser and the Web server being visited. They can be used to track the user’s identity and online behavior. The information acquired from online customers allows the business to analyze customer buying habits. Then the company can suggest related products that may be of interest to a customer.

Mailing Lists

A mailing list is a directory of Internet user addresses of people who want to have information about a topic delivered regularly to their addresses. Some mailing lists are maintained by businesses while other lists are private. The user subscribes to the mailing list to receive messages. Mailing lists can be used to gather market data or to advertise products. Many Web sites that sell products have an option users can select to be added to a mailing list. Reputable sites also have a method that allows users to unsubscribe from the mailing list.

Newsgroups

Newsgroups publish online articles and messages related to a huge number of topics. Users participate in public discussions about a topic by sending messages that all participants in the newsgroup can read. Newsgroups are available for thousands of topics. Some companies sponsor newsgroups related to their products. Users can ask questions or make comments about
Visual Aids

Visual aids consist of the tables, graphs, and other illustrations, such as maps, which are used to present data in a report. The purpose of using visual aids is to help make the report easy to understand. They may also reduce the amount of text needed, presenting the data in a chart or table instead.

Tables

A table contains facts, figures, and other information arranged in rows and columns. Tables can be used to summarize information and to make comparisons. When developing a table to be used in a report, be certain that it relates directly to your report. The table should have a clearly defined purpose and should focus the reader’s attention on a specific aspect of the report.

A report table should be self-explanatory. That is, the reader should not have to refer to text that may accompany the table to understand the table contents. Look at the table in Figure 4-3.8. Is it self-explanatory? Which employee received the highest commission? How much were his or her total sales for the first quarter? Which employee received the lowest commission? How much were his or her total sales for the first quarter?

Figure 4-3.8 displays the standard parts of a table. Some simplified tables will not include all these parts. More complex tables will include other parts such as a source note indicating the source of the data. Ruled lines may be used to separate the data visually. Dot leaders may be used to aid in reading across the table from one column to the next.

![Basic table format](image-url)
Most word processing programs have a table feature that automatically determines column spacing and prepares the table layout. You may wish to start with this table layout and then make adjustments as needed. Spreadsheet software can also be used to create tables. Using spreadsheet software is best when the table contains numbers that must be totaled or used in formulas. Your goal is to create a table that is easy to read and highlights the appropriate information. The following guidelines can be used when formatting tables.

- Key the main headings in all capital letters using a 14-pt. font. Apply bold and center alignment to the title. The title may be placed as the first row in the table grid or above the table grid as shown in Figure 4-3.8. Key a secondary heading in bold a double space below the main heading.
- Key column headings in a 12-pt. font. Apply bold and center alignment to column heads.
- Key data in cells using a 12-pt. regular font. Data in cells can be aligned left, aligned right, or centered. Usually, numbers are aligned right and words are aligned left.
- Center tables horizontally on the page. Center tables vertically on a page or set a 2-inch top margin. When a table is placed in a memo or report, leave one blank line above and below the table.
- Tables can be formatted with the cell borders (gridlines) hidden, with all cell borders showing, or with selected borders showing. Shading or automatic table styles can also be used.
- The body may be either single- or double-spaced. Tables are often double-spaced for improved readability. When the table is placed within the text of a report, use the space available on the page to determine how you will space the table body. The table width should not exceed the left and right margins of the report body.
- Data in a table are often summarized or calculated with the results shown at the end of the table. Total, Average, Maximum, and Minimum are common summary lines included on tables. The last entry in a column is often underscored to separate the table data from the summary lines.

**Graphs**

A graph is a pictorial representation of data. Graphs make the report more interesting and informative. In many cases, data are easier to interpret in a graph than when shown in columns of figures. Graphs, therefore, are used frequently in business reports to display supporting information.

As you prepare business reports containing graphs, study previous reports from the company to determine style preferences. If the graph is half of a page or less in size, include it in the body of the text. Leave a double space before and after the graph to separate it from the text. Position the graph as near as possible to the portion of the text in which it is mentioned, ideally on the same page. If the graph is larger than half a page, place it on a separate page and include a reference to the graph’s page number.

Spreadsheet programs are commonly used to prepare charts and graphs. A pie chart (so called because the graph wedges look like pieces of a pie) is a
display of how a part contributes to the whole. The whole circle represents 100 percent, and each wedge represents a portion of the whole. Each wedge should be identified with an appropriate label, color, or pattern. A pie chart is shown in a report in Figure 4-3.6.

A bar graph is used to show comparisons, as displayed in Figure 4-3.9. Use bars of equal width and space the bars equally across the graph. If more than one set of data is included in the graph, use different colors or patterns to identify the sets of data. Stacked bars, three-dimensional bars, and gridlines may be used to make the data easier to read or understand. The number scale should be adjusted to show an appropriate range. For example, if the numbers graphed range from 75 to 103, the graph scale might begin at 70 rather than at 0. Consider carefully the point you intend to make with the graph. Adjusting the graph scale can make differences in the data appear smaller or larger.

WORKPLACE CONNECTIONS

Tina works in the Accounting Department of a small company. Her manager asked Tina to compare the costs of renting or buying a new copier for department use. Tina created a spreadsheet to include the costs of renting and the costs of buying a copier. If the copier is rented, the regular maintenance and any needed repairs will be handled by the copier rental company. The company must pay only a flat monthly fee. If a copier is purchased, however, the long-term costs will include the maintenance and any repair costs for the copier.

Tina used a spreadsheet to test various possible rent and buy scenarios. She concluded that renting a copier would be more cost-effective for the department. Tina wrote an informal report recommending that the department rent a copier and included a chart comparing the costs of the two alternatives.
A **line graph** is used to display trends that emerge over a period of time. An example is shown in Figure 4-3.10. Monthly sales, for example, are frequently represented in line graph form. In preparing such a graph, place the time categories across the horizontal axis and the amounts along the vertical axis. If more than one set of data is shown on the graph, use different-colored lines to distinguish each set.

**Figure 4-3.10**

*Line graphs are used to display changes over a period of time.*
REVIEWING THE TOPIC

1. What is a business report? What do all business reports have in common?
2. How does an analytical report differ from an informational report?
3. What guidelines should a writer of an informational report follow?
4. Describe three methods or technologies an office worker could use to input data for a report rather than keying the data.
5. What are the advantages of researching information online or using information services?
6. When is a formal writing style appropriate for reports?
7. How do unbound and leftbound reports differ?
8. What are the common parts of a formal business report?
9. Identify visual aids commonly used in business reports. Why are visual aids useful?
10. Describe the best uses of pie charts, bar graphs, and line graphs.

INTERACTING WITH OTHERS

You are working on a special research project with Larry Moore. He was supposed to e-mail you a lengthy attachment vital to your completion of the project. He promised to transmit it to you by noon yesterday. At 4:30 p.m., you have not heard from Larry. You are becoming very concerned because the deadline for the report is only one week away. You must study Larry’s material carefully before you can complete your part of the project. By your estimate, it will take you approximately nine hours to review Larry’s data.

1. Compose and key an e-mail message to Larry that is appropriate for the situation described above. If you do not have e-mail software, key the message as a memo using your word processing software. If using e-mail software, key your teacher’s e-mail address after the To heading. Key an appropriate subject line in all capitals after the Subject heading. (The From and Date information will be added automatically by the e-mail program. Use your name and the current date if using word processing software.)
2. State your concerns and the action that you want Larry to take. Follow proper guidelines for preparing e-mail messages as you compose your message. Make the tone of the message positive.
3. Save and print the message. Send the message if using e-mail software.
REINFORCING MATH SKILLS

You work in the Accounting Department of Black’s Computers, a small retail computer store. Your supervisor, Mrs. Lowell, has sent you a file containing part of the data needed for a report. She asked you to complete the spreadsheet.

1. Open the Excel file CH04 Math from the data files, which contains the report data.
2. Enter the column headings Total Sales, Cost of Units Sold, and Gross Profit in columns F, G, and H.
3. Enter formulas to calculate the total sales for each product to Wayne Middle School for the current year.
4. Enter formulas to calculate the cost of units sold for each product. (Multiply units sold by the wholesale price.)
5. Enter formulas to calculate the gross profit for each product. (The gross profit is the difference between the total sales and the cost of units sold.) Add the gross profit column to determine the total gross profit figure. For the total gross profit amount cell, use a single top and double bottom border.
6. Save your work; you will use it in another activity.

MEMO REPORT WITH TABLE

Your supervisor at Black’s Computers, Mrs. Lowell, has asked you to prepare a table using the spreadsheet you created earlier. The table will be included in a short memo report.

1. Create a memo form for Black’s Computers that includes the company name and the appropriate memo heading lines. Address the memo to Carlos Morales, Vice President of Sales. The memo is from Mrs. Virginia Lowell, Accounting Supervisor. Use an appropriate subject heading. Date the memo using September 4 of the current year.
2. Begin the body of your memo report with the text shown on the following page. Add figures from your spreadsheet to complete the sentences. Next, inform Mr. Morales that you are including a table that shows a complete list of the products Wayne Middle School has purchased this year.
3. Refer to the spreadsheet you completed earlier. (If you did not complete the Reinforcing Math Skills exercise before, do so now.) Hide these columns in the spreadsheet: Product Number, Wholesale Prices, and Cost of Units Sold. Copy the spreadsheet data and paste it into the memo report. Adjust the table format, as needed, for an attractive table.
The information you requested about product sales to Wayne Middle School is provided in this report. The school purchased __________ desktop computers to equip three classrooms. __________ notebook computers were purchased for staff use. One class set of _________ tablet PCs and one class set of ___________ PDAs were purchased. These computers will be used in different classes at various times for specific learning units. Several printers, both inkjet and laser, and a few scanners were also purchased.

Our gross profit for this order was $_________. The three products (by product numbers) that produced the highest gross profit as part of this sale were __________ ($_______), __________ ($_______), and __________ ($_______).

**Topic 4-3**

**ACTIVITY 2**

**Memo Report with Graph**

Mrs. Lowell has asked you to prepare a graph using data from the spreadsheet you created earlier. The Gross Profit column shows the dollar amount of profit on each product. Mr. Morales would like to know the markup percent this amount represents for each product.

1. Open the spreadsheet that you edited in Activity 1. Insert a new column between columns E and F. Enter *Markup Percent* for the column head.
2. Enter formulas in column F to find the markup percent for each product. (Subtract the wholesale price from the selling price and divide by the wholesale price.) Show zero decimal places in the percents.
3. Create a bar graph that compares the markup percents for all the products. (Hide columns B, C, D, and E to make creating the chart easier.) Enter *Markup Percent* for the graph title. Do not include a legend.
4. Add a paragraph at the end of the memo report you created in Activity 1. Introduce and explain what is shown in the bar graph. Tell which product has the highest markup percent. Insert the graph into the report.
5. Keep the last paragraph that introduces the graph and the graph on the same page. Add a second-page memo heading in the header on page 2.
Summary

Much of the communication in business is in written form. Reading and writing skills are essential for all types of office workers. In this chapter, you learned ways to improve your reading and writing skills. You also learned guidelines for preparing business documents. Review the key points from this chapter listed below:

- Employees read at work to learn about the company and understand instructions. They also read to use reference sources, complete forms, and respond to inquiries.
- Reading skills involve comprehension, vocabulary, and speed. All three areas can be improved with practice.
- All office workers need strong writing skills. Among the common writing tasks at work are summarizing messages and meetings, revising writing done by others, and preparing messages in various forms.
- Effective documents are well planned. They are clear, concise, courteous, complete, and correct.
- Using proper spelling, punctuation, and grammar are important for writing at work.
- Managing the schedule for writing tasks is important for meeting writing deadlines.
- The three stages of planning effective documents are drafting the document, revising or editing it, and proofreading it for final form.
- When writing a document, know your purpose, your message, your audience, and the response you want from your audience.
- Positive, neutral, negative, and persuasive messages are used in business documents.
- Business letters are formal documents. They are usually written to people outside the company.
- Memos are informal documents. They are generally written to people inside the company.
- Employees often individualize letters when similar letters are sent to hundreds of people.
- Memos should be used to give confidential information or for routine messages to people who do not have access to e-mail. E-mail is appropriate for most other short written messages.
- Desktop publishing is used to create high-quality printed documents. These documents usually contain text and images and often have complex formats.
Business reports are a source of information for making business decisions. They are basically either analytical or informational in nature. They may be in either a formal or an informal style.

Visual aids, such as tables and graphs, are used in business reports to make a report more understandable. They add interest to the report and may reduce the text needed to explain the information.

Key Terms

- appendix
- bar graph
- comprehension
- documentation
- draft
- font
- footer
- format
- goodwill
- header
- kerning
- line graph

- negative message
- netiquette
- neutral message
- optical character recognition (OCR)
- pagination
- passive voice
- persuasive message
- pie chart
- positive message
- proofreading
- protocol

- quotation
- references
- resolution
- spam
- speech/voice recognition
- software
- tone
- vocabulary
- white space

Chapter 4 | ACTIVITY 1

Press Release

Assume that you are an assistant manager in the Public Information Department of Laughlin & Mead Corporation. The company’s Board of Directors met yesterday. They elected Mr. T. W. Gomez to the company’s new position of Vice President for Technology. The public information director has asked you to prepare a draft of a press release. The release will be sent to local newspapers as well as to business periodicals.

1. Open the PDF file CH04 Press Release from the data files, which contains a sample press release. Read the document to learn about writing and formatting a press release.

2. Compose and key a draft of a press release for review by the department manager. Use the current date and your name as the contact person. Other details that should be included in the release are given on page 2 of the CH04 Press Release file. Single-space the body of the release. It will be distributed in printed form and posted online.
3. Work with a classmate. Act as the department manager and review your classmate’s press release. Use proofreaders’ marks or the editing feature of your word processing software to add comments and corrections to the document.

4. After your classmate has reviewed your document, make corrections and print a final copy of the press release.

5. Save the document as a Web page appropriate for posting online. View the document in your browser software. Make corrections to the format as needed for an attractive online document. Save and print the Web page version of the press release.

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**Chapter 4  ACTIVITY 2**

**Leftbound Report**

In this activity, you will format text for a leftbound report. Review report guidelines and examples found in Topic 4-3 to help you complete this activity.

1. Open the *Word* file *CH04 Leftbound Report* found in the data files. Format the text as a leftbound report with a title page, table of contents, body, and references page.

2. Use a heading style available in your software to format the side headings. Adjust the style, if needed, so the side headings appear in a 14-pt. font.

3. Create a header to number the pages in the body of the report. The second page of the body should be page 2.

4. Generate a table of contents using the appropriate features of your software. Adjust the format of the table of contents to make the lines double-spaced. Delete any lines at the beginning of the list that are not needed, such as the report main title. Only the side headings and the References page should be listed. Change the References entry to initial cap to match the other entries.