

# Writing Effectively for Your Audience, Purpose, and Medium



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**M**uch of this book focuses on writing in business. Is oral communication important? Absolutely. How about visual communication? Definitely.

We focus on written communication because experienced businesspeople tend to place writing skills ahead of other communication skills when asked what they seek in job applicants. In fact, according to Daina Lawrence of the *Globe and Mail*,<sup>1</sup> written and oral communication skills are among the top skills for business owners and employees in the Canadian job market. Also, as employees advance, they do more knowledge work, which often requires expertise in written forms of communication. Therefore, your written communication skills are ones you want to continuously develop as a business professional.

Developing your oral communication skills is essential, as well, and you'll likely find that many

of the strategies for developing written messages also apply to oral messages.

### Learning Objectives

- L02-1** Discuss the importance of skilful writing in business.
- L02-2** Describe the writing process and effective writing strategies.
- L02-3** Describe the use of computer tools to facilitate planning messages.
- L02-4** Describe the use of computer tools to facilitate drafting messages.
- L02-5** Describe the use of computer tools to facilitate revising messages.
- L02-6** Describe the purpose and form of letters.
- L02-7** Describe the purpose and form of memorandums (memos).
- L02-8** Describe the purpose and form of email.
- L02-9** Discuss the nature and business uses of other communication media.
- L02-10** Describe how technology will continue to impact communication in the future.



# Problem-Solving Challenge

## Managing Multiple Media

Introduce yourself to this chapter by shifting to the role of Julie Evans, a recent graduate from Concordia University in her first job as an accounts manager at a small company that manufactures windows. You are amazed (and sometimes overwhelmed) by the types of messages you send each day. Every day you process dozens of internal email messages. Occasionally you write and receive memorandums. Then there are the more

formal communications you exchange with people outside the company—both email and letters. You also write messages for social media sites and daily rely on text messaging and instant messaging for quick communication.

With so many audiences and so many ways to send messages with your co-workers, you often wonder if you're making good choices. Are you choosing the right

channel for your communication? Are your messages accomplishing your business and communication goals? Are you using communication and computer technologies effectively and efficiently? Are your readers able to understand your messages and act on them?

This chapter guides you through the main types of business messages so that you are sure to meet the needs of your audience.

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**L02-1** Discuss the importance of skilful writing in business.

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## The Importance of Good Business-Writing Skills

Writing is in some ways more difficult to do well than other kinds of communication because the words alone must communicate the message. Essentially, you have no safety net; you can't rely on your facial expressions, body language, or voice to set the tone for a message. To be an effective business writer, then, you must develop the ability to capture a complex reality in words, which requires you to use ingenuity, discipline, critical thinking, and problem solving.

The first major section of this chapter will help you capture the complex nature of writing by showing you how to divide the writing process into parts. You will also learn tips for using technology to be more efficient in each part of the writing process. The remainder of the chapter will discuss the features and conventions associated with the main forms of business messages.

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**L02-2** Describe the writing process and effective writing strategies.

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**planning** Making a detailed proposal for doing or achieving something.

**drafting** Preparing a preliminary version of a document.

**revising** Reviewing and correcting or changing a document.

**recursive** A process that continually revises itself to accommodate changes that are made over time.

## The Writing Process

The writing process is really the process of problem solving and critical thinking. Familiarizing yourself with this process will help you become a more deliberate, effective business writer.

As Exhibit 2-1 shows, preparing any piece of business writing involves three stages: **planning**, **drafting**, and **revising**. In other words, you figure out what you want to say, you say it, and then you say it better. Each of these stages can be divided into various specific activities. However, as the arrows in the figure suggest, you should not think of the three stages as strictly chronological or separate. In practice, the stages are interrelated. Like the steps for solving business communication problems described in Chapter 1, they are **recursive**. For example, you may start writing pieces of the draft during the planning stage. Or you may find when drafting that gathering more information is necessary. Or you may decide to revise a piece of the document carefully before continuing with the drafting. In other words, you should make sure your process is flexible if you want to achieve the best results in creating your messages.

A good practice for beginning business writers is to spend roughly one-third of the writing time in each of the three stages. A common mistake that writers make is spending too much time on drafting and too little on the other two stages—planning and revising. Preparing to write and improving what you have written are as necessary to success as the drafting stage, and careful attention to all three stages can actually make your writing process more efficient.

Once you have become an experienced business writer, you will be able to write many messages without as much planning and revising. Even so, some planning and revising will still be essential to getting the best results with your messages.

## Planning the Message

Chapter 1 presents a problem-solving approach to business communication. As Exhibit 1-5 indicates, you need to develop a definition of the problem that you are trying to solve. Once you have defined your problem, you can plan your message by answering several questions regarding your context and audience.

As you plan written documents in particular, you can make the planning process more manageable by thinking about it in five smaller steps: determining goals, analyzing the audience, gathering information, analyzing and organizing the information, and choosing the form, channel, and format the document will take.

Planning a good message takes time, especially when you are writing for an audience you may not know all that well. The investment of your time pays dividends when you are able not only to achieve the goal of your message but also to enhance your professional image by writing a coherent, concise message.

## Determining Goals

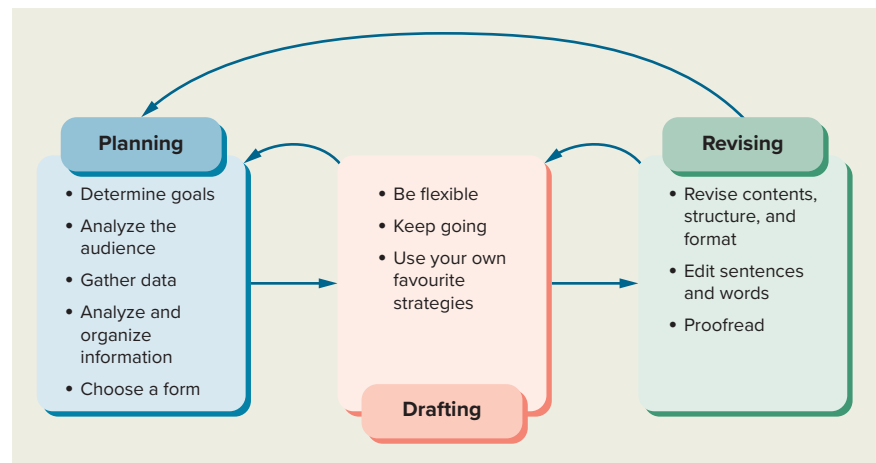
Because business writing is largely performed in response to a certain situation, one of your main planning tasks is to figure out what you want to do about that situation. Bear in mind that in business communication, *what to do* means not only what you want your communication to achieve but also any action related to solving the larger business problem. Let's say, for example, that you manage a hotel where the air conditioning has stopped functioning. You will need to decide what to communicate to your guests about this problem. However, this decision is related to other decisions. How and when will you get the air conditioning problem solved? In the meantime, will you simply apologize? Make arrangements for each guest to have a free continental breakfast or complimentary beverages? Rent fans for meeting rooms and any guest rooms occupied by people with health problems?

As Exhibit 2-2 shows, solving the business problem is closely related to both your communication goals and business goals. You will need to bring your **business goals** (e.g., increase profits, ensure customer satisfaction) to bear on your **writing goals** (e.g., communicate your message, promote your professional image, build goodwill)—and clarifying your writing goals will help you generate business solutions.

## Analyzing the Audience

Once you know your purpose—what you want your message to do—you need to **analyze the audience** who will read your message. Who will be affected by what you write? What organizational, professional, and personal issues or qualities will affect the audience's response to your message? What organizational, professional, and personal issues or qualities

**Exhibit 2-1** The Writing Process



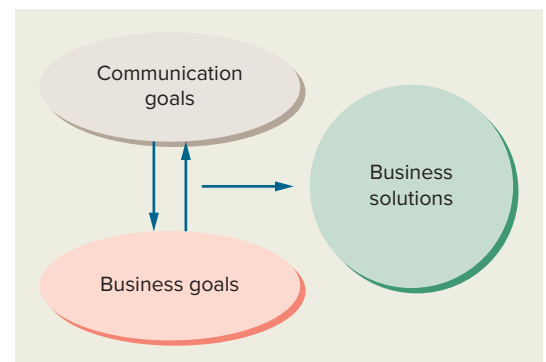
**business goals** The objectives a business wishes to achieve; for example, maximizing profits, decreasing administrative costs, or enhancing corporate social responsibility.

**writing goals** What a writer wants to achieve with a message, such as promoting a professional image, attracting new business, or building goodwill.

**analyze the audience** A process that helps you understand what channel of communication, tone, style, content, organization, and format will be most effective with particular readers or listeners.

**Exhibit 2-2**

The Interrelated Nature of Business Goals and Communication Goals





### Your relationship to your audience

What is my relationship **to** my audience?

- ☐ Colleague or someone of equal rank
- ☐ Manager or someone of superior rank
- ☐ Client or customer
- ☐ Other: \_\_\_\_\_

What is my relationship **with** my audience?

- ☐ Friendly and informal. I know my audience well. We communicate often and have a social business relationship.
- ☐ Friendly and formal. We've met and have a cordial, businesslike relationship.
- ☐ Neutral or no relationship. I don't know my audience personally.
- ☐ Unfriendly or hostile.
- ☐ Other: \_\_\_\_\_



### Your audience's reaction

What is my audience's likely reaction to my message?

- ☐ Positive
- ☐ Negative
- ☐ Neutral

What do I want my audience to **think, feel, do, know, or believe** as a result of my message?

- ☐ \_\_\_\_\_
- ☐ \_\_\_\_\_
- ☐ \_\_\_\_\_

What factors in **my company culture** or other background information should I consider?

- ☐ \_\_\_\_\_
- ☐ \_\_\_\_\_
- ☐ \_\_\_\_\_

What factors in **my audience's culture** or background should I consider?

- ☐ \_\_\_\_\_
- ☐ \_\_\_\_\_
- ☐ \_\_\_\_\_

What does my audience need to know?

- ☐ \_\_\_\_\_
- ☐ \_\_\_\_\_
- ☐ \_\_\_\_\_

What does my audience already know?

- ☐ \_\_\_\_\_
- ☐ \_\_\_\_\_
- ☐ \_\_\_\_\_



### Your communication channel

What is the best way for your reader to receive your message?

- ☐ \_\_\_\_\_ would be the best channel for delivering the message.
- ☐ This channel is best because \_\_\_\_\_

do you have that affect how you will write your message? What is your relationship with your reader(s)? Are you writing to your superior? Your colleagues? Your subordinates? Clients? Answers to these questions and others (see Exhibit 2-3) will influence your choices regarding your channel of communication, tone, style, content, organization, and format.

In the hotel manager scenario, for instance, how might your approach in an announcement to guests who are currently at the hotel differ from your approach in a response to a guest's complaint letter a week after the incident? Though you should take time to analyze your audience early in the planning process, you should continue to think of your audience as you proceed through the rest of the planning stage and through the drafting and revising stages, too. Always be thinking about what kind of information will matter most to your audience. If you fail to meet your audience's needs, you compromise your professional image and your ability to meet your business and communication goals.

## Gathering Information

Once you have a sense of what you want your message to achieve and what the audience needs to know, you may need to do some research. In many cases this research can be informal—finding past correspondence; consulting with other employees or with outside advisers; or reviewing sales records, warranties, and product descriptions. In other cases you will do formal research, such as conducting surveys or reviewing the literature on a certain subject. In general, you will collect any information that can help you decide what to do and what to say in your message.

Gathering information by using your memory, problem-solving skills, and creativity is also important. For example, you can visualize your readers in order to determine their interests. Likewise, you can list pertinent facts and then **brainstorm** (generate possible solutions without censoring them) to develop creative solutions. You might also diagram your ideas to collect your thoughts.

## Analyzing and Organizing the Information

Once you have ideas, you can analyze them. If your data are numerical, you will do the calculations to see patterns and meaning in the numbers. You will put other kinds of data together, as well, to see what course of action they might indicate, weighing what the parties involved stand to gain or lose from each possible solution.

As you think about what to say in your message, you will, of course, keep your readers in mind. What kind of information will matter the most to them? In our scenario, will the hotel guests want information about what caused the air conditioning problem? Perhaps they will also want to know when it will be fixed and what they can do to stay comfortable. As always, your intended readers are your best guide to what information to include.

The readers are also your guide for organizing the information. Whatever order will draw the most positive reaction from your readers is the best order to use. If you have information that your readers will consider routine, neutral, or positive, then put it first. This plan, called the **direct order**, is discussed in Chapter 8. On the other hand, if you think your information could run the risk of evoking a negative response, you will employ an **indirect order**, using your message's opening to prepare the reader to receive the news as positively or neutrally as possible. As you will see in Chapter 9, such a message usually requires a more skilful use of organization and word choice than one written in the direct order. Regardless of the situation, all readers appreciate logically organized information.



# Communication Matters

## Do I Need to Write It?

When you have a substantial message to convey—that is, one not suitable for a quick text or instant message—is it better to write it or speak it? You'll probably want to write it if one or more of the following applies:

- You want a written record of the communication.
- You want the communication to be perceived as somewhat formal.
- You think you can explain better in writing, and you don't want the recipient to interrupt you until you're done.
- Your reader will want to be able to review what you said.
- You have to reach a lot of people at once with the same message.
- The situation isn't so sensitive or timely that it requires an oral communication channel such as a phone call.



## You Make the Call

If you were the hotel manager, how would your responses to the guests differ?

**brainstorm** A spontaneous group discussion to produce ideas and ways of solving problems.

**direct order** A common way to organize the kind of information that your readers will likely consider routine, neutral, or positive.

**indirect order** A way to organize information that you think may create a negative response in your reader; prepares the reader to receive the news as positively or neutrally as possible.

**genres** Forms of communication that have their own conventions with regard to formatting, style, and content.

## Choosing a Form, Channel, and Format

Students typically produce writing of two types: essays or research papers. But on the job you have a wide range of established forms of communication (**genres**) from which to choose. Which one you use has a significant impact on your planning. For instance, if you want to advertise your company's services, how will you do it? Write potential customers a letter? Email them? Send a brochure? Create a website? Post a message on your company's social

### Exhibit 2-4 Illustration of the Difference between Ineffective and Effective Formatting

At its October 20, 2018, meeting, the Faculty Senate, having received a favorable recommendation from the Academic Affairs Committee, voted to approve the creation and Autumn Quarter implementation of two new grades: "X" and "WX." Instructors will record an "X" on the final grade roster for students who never attended any classes and did not submit any assigned work. The "X" will appear on the transcript and will carry zero (0.00) quality points, thus computed into the GPA like the grades of "F" and "UW." Instructors will record a "WX" for those students who officially withdrew from the class (as denoted on the grade roster by either EW or W) but who never attended any classes and did not submit any assigned work. The "WX" may be entered to overwrite a "W" appearing on the grade roster. An assignment of "WX" has no impact on the student's GPA. A "W" will appear on the student's online grade report and on the transcript. The "WX" recognizes the student's official withdrawal from the class and only records the fact of nonparticipation. The need to record nonparticipation is defined in "Rationale" below. With the introduction of the "X" and "WX" grades to denote nonparticipation, by definition all other grades can only be awarded to students who had participated in the class in some way. Instructors will record a "UW" (unofficial withdrawal) only for students who cease to attend a class following some participation. Previously, instructors utilized the "UW" both for those students who had never attended classes and for those who had attended and participated initially but had ceased to attend at some point during the term. In cases of official withdrawal, instructors have three options available at the time of grading: "W," "WX," and "F." If the student has officially withdrawn from the class, a "W" (withdrawal) or "EW" (electronic withdrawal) will appear on the grade roster. If the student participated in the class and the withdrawal was in accordance with the instructor's withdrawal policy as communicated by the syllabus, the instructor may retain the student's "W" grade by making no alteration to the grade roster. . .

**Now look at the first part of the actual message that was sent out. What formatting decisions on the part of the writer made this document much more readable?**

At its October 20, 2018, meeting, the Faculty Senate, having received a favorable recommendation from the Academic Affairs Committee, voted to approve the creation and Autumn Quarter implementation of two new grades: "X" and "WX."

#### **Definition of "X" and "WX" Grades, Effective Autumn Quarter 2018 "X" Grades (no withdrawal, nonattending):**

- Instructors will record an "X" on the final grade roster for students who never attended any classes and did not submit any assigned work.
- The "X" will appear on the transcript and will carry zero (0.00) grade points, thus computed into the GPA like the grades of "F" and "UW."

#### **"WX" Grades (official withdrawal, nonattending):**

- The "WX" may be entered to overwrite a "W" appearing on the grade roster. An assignment of "WX" has no impact on the student's GPA. A "W" will appear on the student's online grade report and on the transcript. The "WX" recognizes the student's official withdrawal from the class and only records the fact of nonparticipation. The need to record nonparticipation is defined in "Rationale" below.
- Instructors will record a "WX" for those students who officially withdrew from the class (as denoted on the grade roster by either "EW" or "W") but who never attended any classes and did not submit any assigned work.

**Participation and Nonparticipation Grades** With the introduction of the "X" and "WX" grades to denote nonparticipation, by definition all other grades can only be awarded to students who participated in the class in some way. Instructors will record a "UW" (unofficial withdrawal) only for students who stop attending a class following some participation. Previously, instructors used the "UW" both for those students who had never attended classes and for those who had attended and participated initially but stopped attending at some point during the term.

#### **Official Withdrawals**

In cases of official withdrawal, instructors have three options available at the time of grading: "W," "WX," and "F."

1. *If the student has officially withdrawn from the class, a "W" (withdrawal) or "EW" (electronic withdrawal) will appear on the grade roster. If the student participated in the class and the withdrawal was in accordance with the instructor's withdrawal policy as communicated by the syllabus, the instructor may retain the student's "W" grade by making no alteration to the grade roster. . .*

media sites? Use some combination of these? Each form of communication (genre) has its own formatting, stylistic, and content conventions. As a businessperson, you want to start your writing tasks with some sense of the genre you are using. The genre itself helps you know what to say and how to say it.

You can make decisions about a document's format or visual design at any point in the writing process, but usually the planning stage involves preliminary decisions about how your document will look. How can you make the information easily readable and accessible to your audience? Will you be dividing the contents with headings? Could a bulleted or numbered list help your reader? Will you use any visual elements such as a logo, picture, or diagram? Anticipating the format can help you plan an inviting and readable message.

Formatting and visual appeal impact readers' reactions. For example, Exhibit 2-4 shows the starting text of an email from a university registrar to the faculty with the subject line "X" and "WX" Grades Effective for Autumn 2018 Grading. How inviting do you find the format, and how easy is it to understand the information about the two new grades?

## Using Computer Tools to Plan a Writing Project

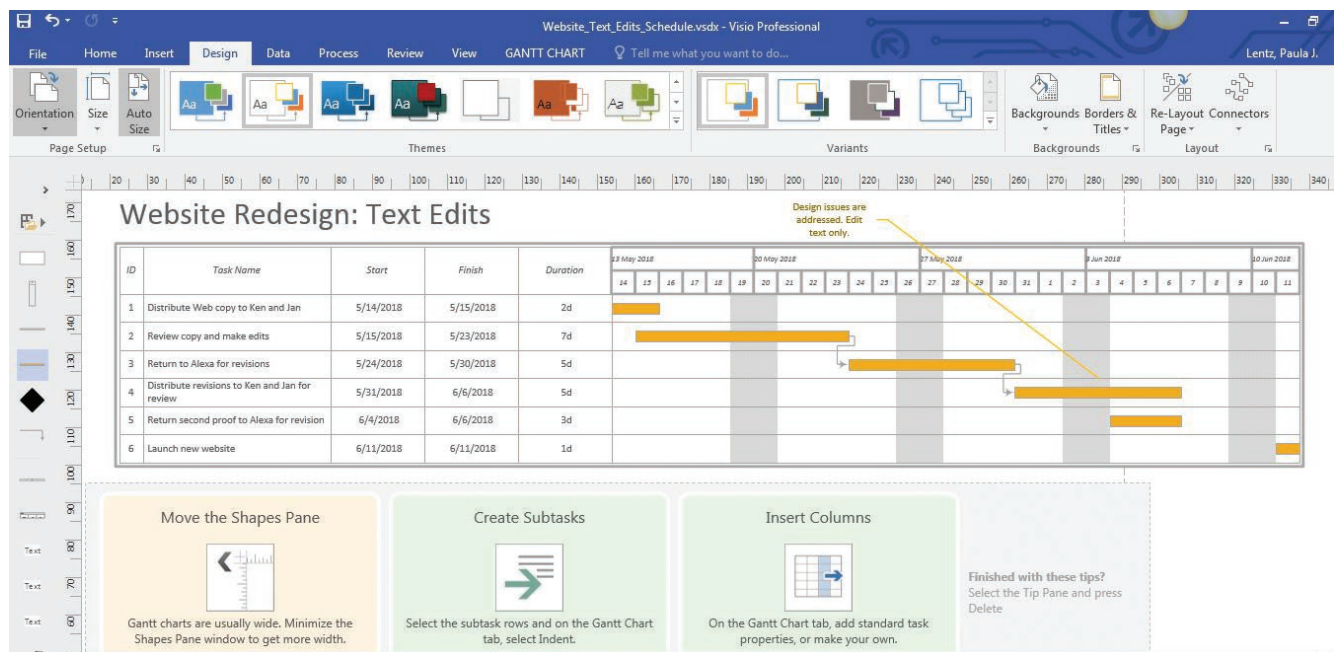
Sometimes, a writing project requires significant planning. Other times, writing a document is part of a larger project, and you need to schedule the writing among the other tasks in the project. It could also be that you are writing short documents that have specific deadlines or timelines associated with them, and you want to make sure you have allotted enough time in your schedule to write them.

Whatever the case, you may find it helpful to use **project planning tools** such as Microsoft Visio. Project planning tools are a great way to visualize the scope of a project and see how all of the pieces will come together to create a final product or achieve a business goal. A Gantt chart (Exhibit 2-5) is commonly used to identify all the tasks needed to complete a project and to determine how much time each task will take. It can also help you track your progress and determine how to reallocate your resources to complete a project on time or within budget.

**L02-3** Describe the use of computer tools to facilitate planning messages.

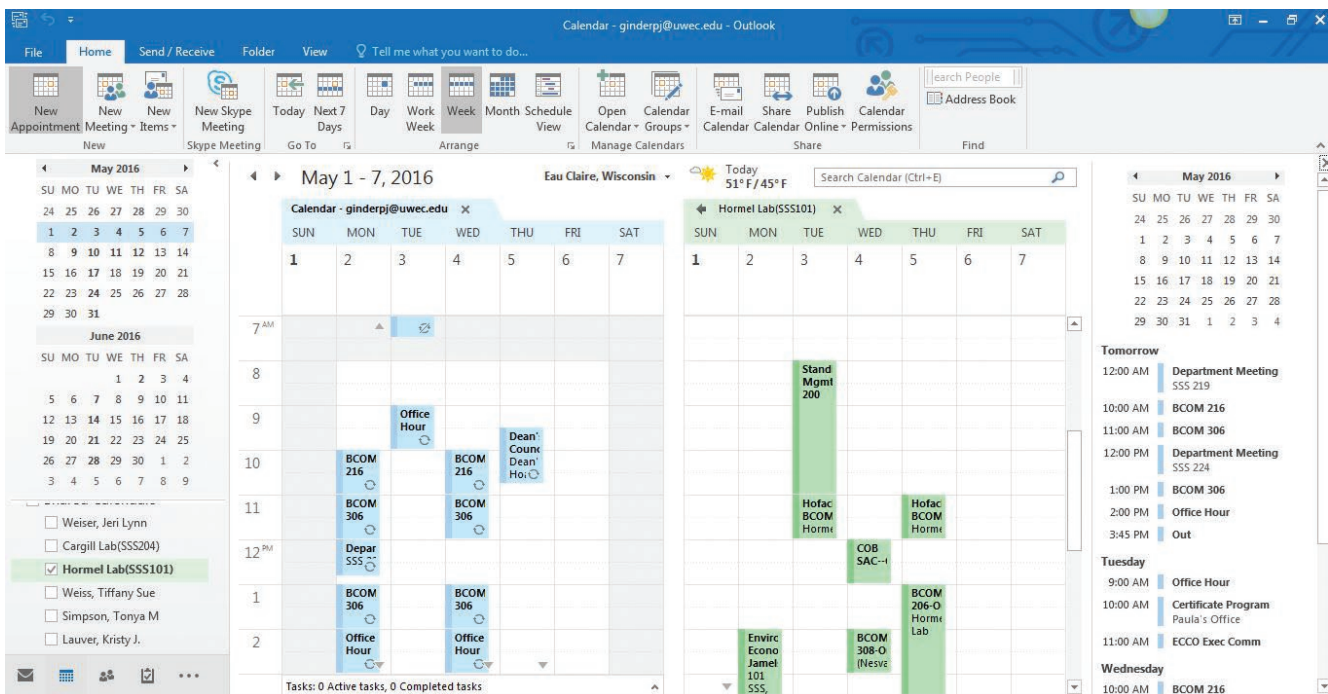
**project planning tools**  
Aids to visualizing the scope of a project and seeing how all of the pieces will come together to create a final product or achieve a business goal.

**Exhibit 2-5** Illustration of a Gantt Chart Created with a Microsoft Visio Template



Source: Microsoft Office 2019

## Exhibit 2-6 Illustration of a Calendar in Microsoft Outlook



Source: Microsoft Office 2019

**electronic calendar** A digital device used to schedule meetings, set appointment reminders, and perform many other functions to manage your time.

Finding time for writing, of course, is one of the major challenges for businesspeople. By using an annotated **electronic calendar**, you can plan time for completing your writing projects. One such desktop tool is Microsoft Outlook. Exhibit 2-6 shows an Outlook calendar, which allows you to view your calendar in multiple formats, see others' shared calendars, schedule meetings, set appointment reminders, and perform many other functions to manage your time.

Good business writers always take the time to plan, using whatever tool helps their planning process. Using the powerful features that both project management and electronic calendars provide will give you the potential to produce high-quality work in a timely fashion.

## Using Computer Tools to Gather and Organize Information

As we've discussed in previous chapters, before you can write, you need to know what information you require to accomplish your business and communication goals. Gathering information is one of the business writer's most important jobs.

Chapter 11 introduces you to many resources for conducting secondary research—databases, reference materials, library catalogues, company webpages, listservs, professional organizations, social networking sites (e.g., Facebook, LinkedIn, and Twitter), and other helpful websites.

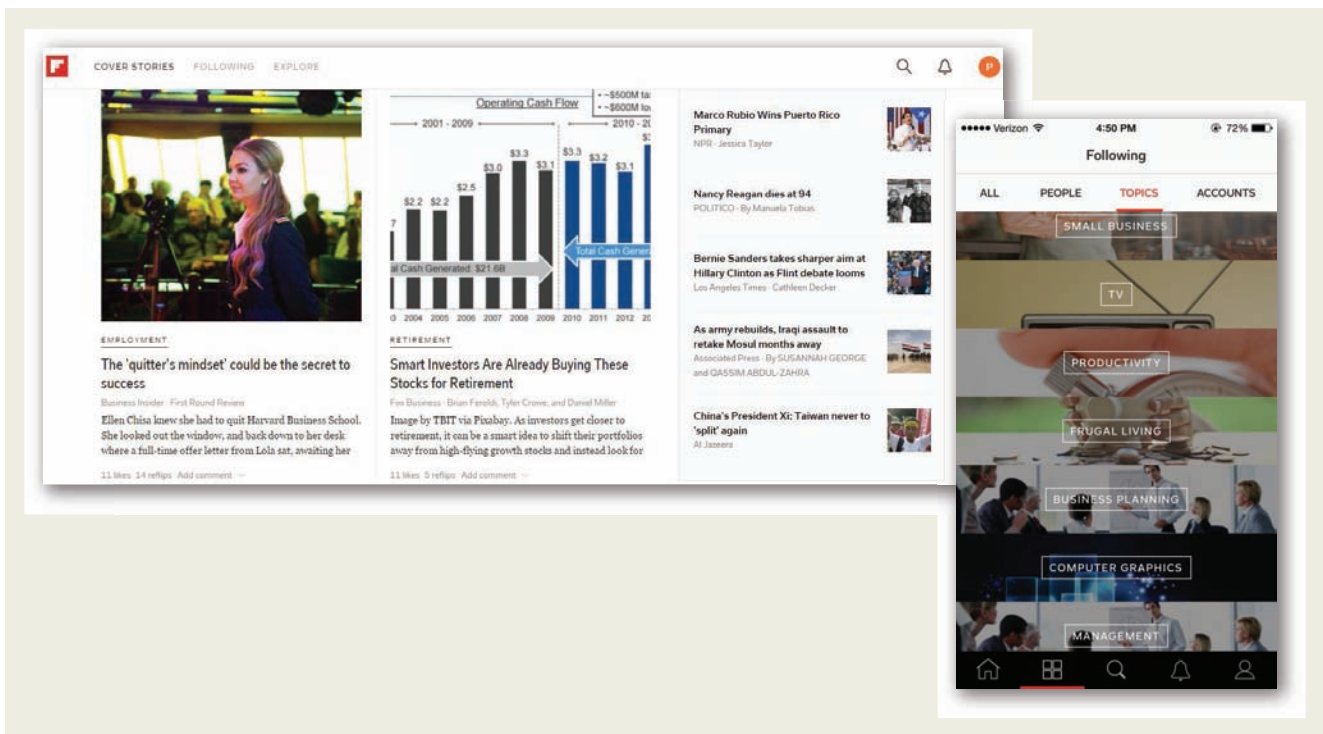
While it's nice to be able to seek information using these resources, it's also convenient to have information come to you via an RSS (really simple syndication)



**Technology can help a writer create effective business messages.**

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## Exhibit 2-7 Illustration of the Desktop and iOS App Versions of Flipboard



**Source:** flipboard.com; © Rob Watkins/Play Among Friends Paf/Flickr/CC BY 2.0; Source: Image by TBIT via Pixabay/Fox Business; © Paul Sancya/AP Images; © Ron Edmonds/AP Images; © Scott Olson/Getty Images © Khalid Mohammed/AP Images; © Pichi Chuang/Reuters; © Jupiterimages/Getty Images; © Jeffrey Coolidge/Getty Images; © Tetra Images/Getty Images; © Seb Oliver/Getty Images; © Chris Ryan/Getty Images; © jjaakk/Getty Images.

reader. Readers such as Flipboard or Feedly pull content from around the Web based on your interests. Because you can use these readers with either a desktop or mobile device, you can always access information immediately or save it for later reading. Exhibit 2-7 illustrates the variety of information that can appear in Flipboard.

Whatever method you choose to gather data, you want to be aware of the latest trends, news, and research in your field and have ready information for your writing needs.

## Organizing Your Information

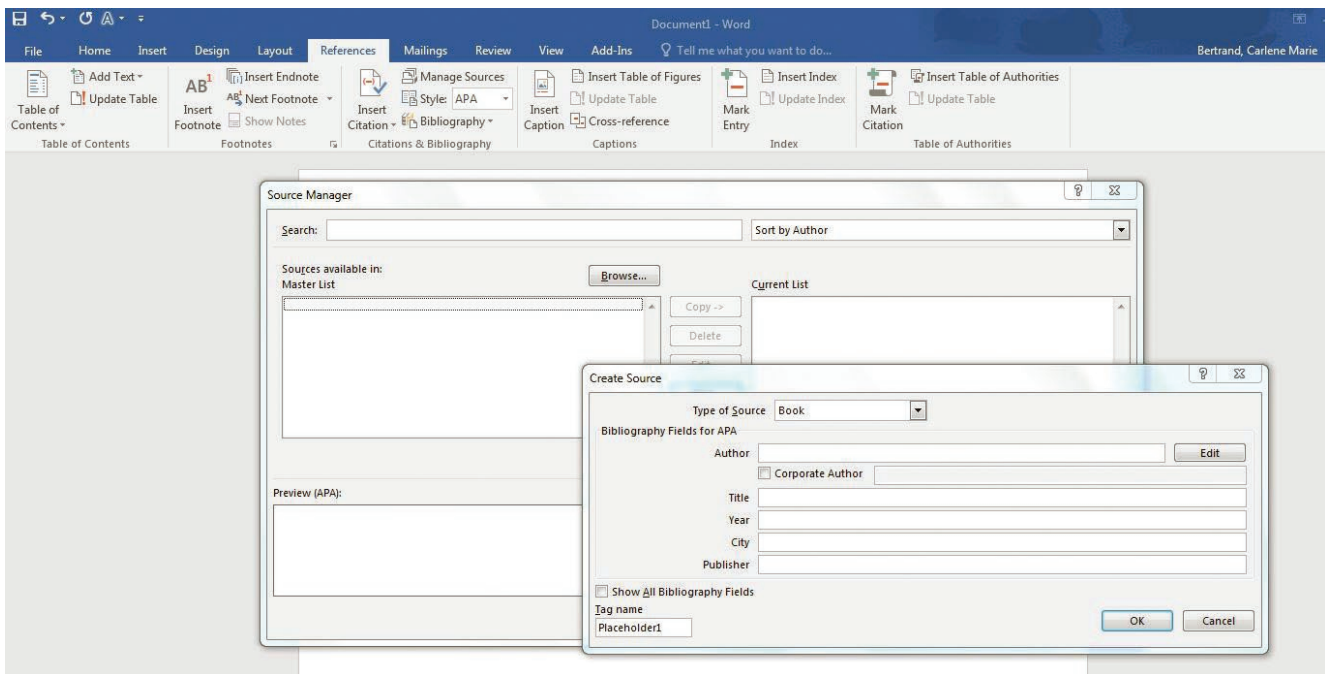
Once you have gathered the facts, you will want to store them in some organized fashion so you can retrieve them easily. **Database tools** will help you here. For instance, if your company is interested in developing a product for a newly defined market niche, you may want to collect information about the targeted market, potential suppliers of components of your new product, sites for producing the product, projected labour costs, and so on. You could organize your information by entering your notes about target markets, names of suppliers, and other data in an individually designed form created with database tools. The information you have collected will be available whenever you need it. You can search and sort it on any of the categories (fields) you set up in your database.

Variations of the generic database are specialty tools such as EndNote, ProCite, and RefWorks. These specialty programs allow you to transfer bibliographic information automatically from a wide variety of online databases.

Microsoft Word 2019 also provides a database for managing sources (Exhibit 2-8). To use the database, click References > Citations & Bibliography tab > Insert Citation. After you have inserted your citations, you can organize them by clicking the Manage Sources icon.

**database tools** Software that allows you to organize information and retrieve it easily.

## Exhibit 2-8 Illustration of the References Tool in Word 2019



Source: Microsoft Word 2019

### Organizing Your Ideas

Organizing your ideas is essential for writing a clear message. You may find it helpful to organize ideas using an **outlining or concept-mapping program** (Exhibit 2-9). Some, such as Edraw, have both free and at-cost programs available. Once you have captured your ideas and grouped related ideas, you can rearrange them into an order that will be meaningful to your audience.

**outlining or concept-mapping program** Software to help you organize ideas and arrange them into an order that will be meaningful to your audience.

### Using Computer Tools to Present Information

Once you've gathered and organized your information, you need to think about how you will present the information to your audience. Deciding how to present your data requires that you think about how you will organize your data and content to best meet your audience's needs.

**statistical programs** Software that allows writers to organize raw numbers so that the data become visually accessible.

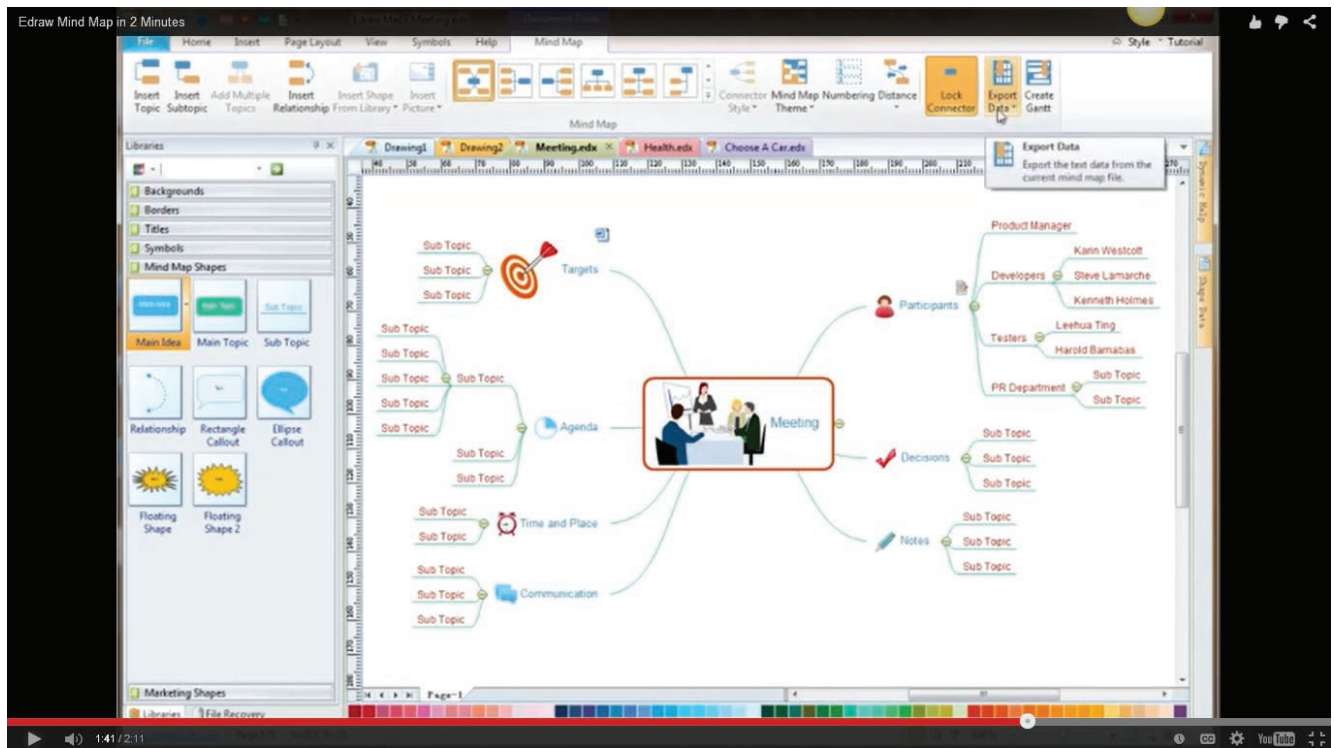
**Statistical programs** such as SPSS and SAS are now user friendly, allowing writers to organize raw numbers into meaningful pictures of their data. In addition, spreadsheet programs such as Excel (Exhibit 2-10) will compute a broad range of data to help writers interpret the data and make it visually accessible.

In addition, as you think about presenting your information, you'll need to consider how different computer tools meet different needs. Picking the right tool makes your work as a writer easier and helps ensure that your message is communicated in ways appropriate for the genre or medium of communication.

**multimedia presentation** Video, music, still photos, screen captures, and narration compiled into one presentation.

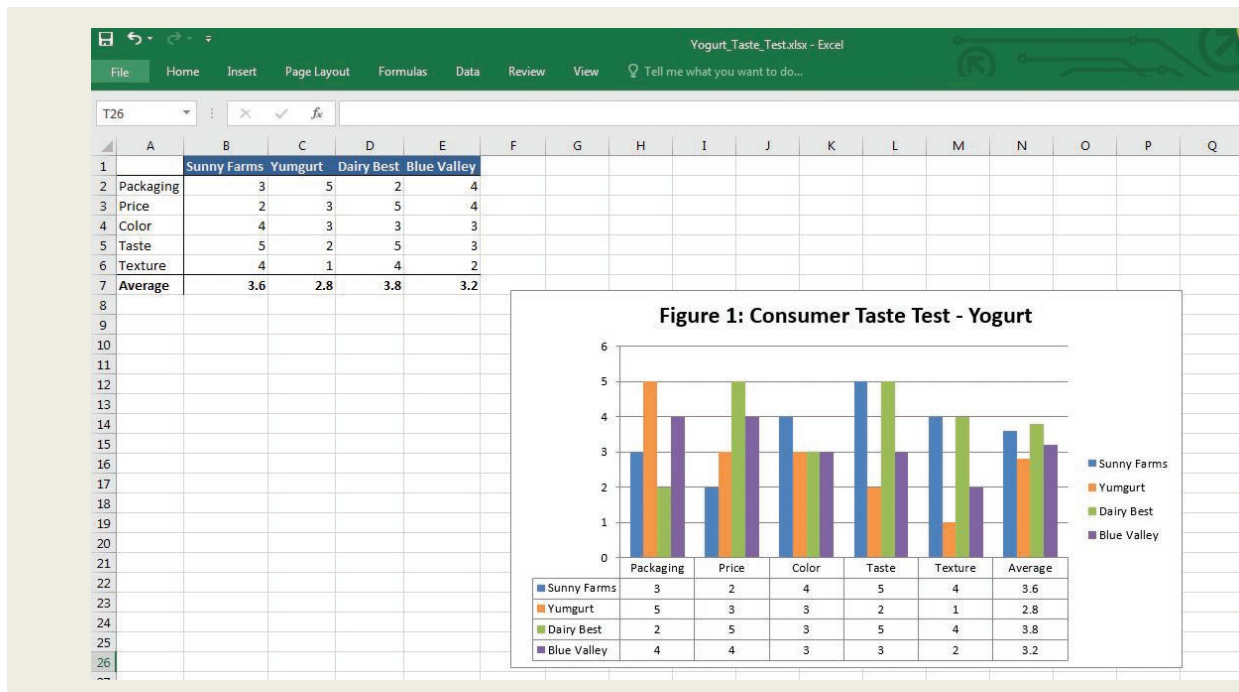
- To develop a **multimedia presentation**, consider programs such as Microsoft MovieMaker, Camtasia, PowerPoint, Articulate's Storyline, or Jing; you'll also want to consider programs such as Audacity to record and edit audio. All of these allow you to integrate video, music, still photos, screen captures, and narration into one presentation. Keep in mind, though, that with multimedia presentations you want to make them accessible to people of all abilities. For example, if you're creating a multimedia presentation that includes narration, you will want to accommodate listeners with hearing impairments by providing a transcription of your narration or include the text of the narration

## Exhibit 2-9 Illustration of the Edraw Concept-Mapping Tool for Organizing



Source: EdrawSoft

## Exhibit 2-10 Illustration of Data Visualization Using Excel



Source: Microsoft Excel 2019

**online publication** The process of creating and formatting documents and other information for consumption online.

in the presentation. Likewise, if your presentation contains Flash elements, which are not recognized by the screen readers used by people with visual impairments, you'll want to provide a transcript, as well.

- To give your documents a professionally designed look, consider desktop publishing programs such as Microsoft Publisher or Adobe InDesign. Word processing programs provide many layout and formatting options, but desktop publishing programs provide flexibility and precision for placing information on the page, formatting your text, and placing visual elements.
- To create documents for **online publication**, you can use programs such as Dreamweaver, Weebly, Kompozer, or SeaMonkey; however, programs such as Microsoft Word or Publisher let you save documents as .html files for Web publication.

Choosing the right technology for a writing task makes at least part of your job easier. The time invested in learning the technology may save you time later by helping you make your writing process more efficient.

## Drafting

Flexibility is the key to creating drafts of your business documents. Writers often hinder themselves by thinking that they have to write a finished document on the first attempt with all parts in their correct order and with perfect results. The following suggestions can help you draft your messages as painlessly and effectively as possible.

### Avoid Perfectionism When Drafting

Trying to make your first draft perfect causes two problems. First, spending too much energy perfecting the early parts can make you forget important pieces and purposes of the later parts. Second, perfectionism can make drafting frustrating and slow, and thus keep you from wanting to revise your message when you're done. You will be much more inclined to review your message and improve it if you have not agonized over your first draft.

### Keep Going

When turning your planning into a draft, don't let minor problems with wording or grammar distract you from your main goal—to generate your first version of the document. Have an understanding with yourself that you will draft rather quickly to get the ideas down on paper or onto the screen and then go back and carefully revise. Expressing your points in a somewhat coherent, complete, and orderly fashion is hard enough. Allow yourself to save close re-examination and evaluation of what you've written for the revision stage.

### Use Your Own Favourite Strategies

The idea with drafting is to keep moving forward at a reasonably steady pace with as little stalling as possible. Do anything you can think of that will make your drafting relatively easy. For example, write at your most productive time of day, write in chunks, start with a favourite part, talk aloud or write to yourself to clarify your thoughts, take breaks, let the project sit for a while, create a setting conducive to writing—even promise yourself a little reward for getting a certain amount accomplished. Your goal is to get the first orderly expression of your planned contents written just well enough so that you can go back and work with it.

## Using Computer Tools to Draft Messages

You are likely familiar with Microsoft Word or another word processing program as a technology for creating your documents. In addition to the basics of using the software to open files, draft, edit, cut and paste, change a font size and style, and print a document, this software offers many more options for helping you with the drafting process. Because of its

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**L02-4** Describe the use of computer tools to facilitate drafting messages.

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popularity, we reference Microsoft Word, but many of the tools we discuss are readily available in other word processing programs, as well.

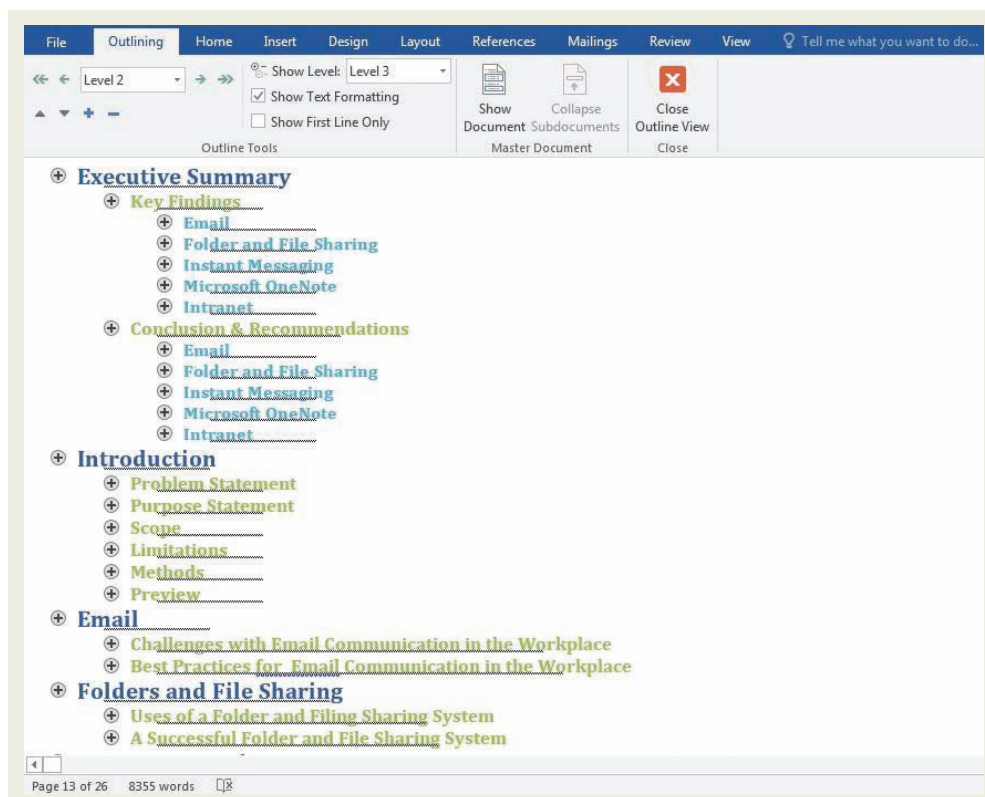
## Use the Help Feature

When using your software, be sure that you control the software rather than letting it control you. That is, if you need your software to do something, look for a way to accomplish the task. *The computer wouldn't let me* is really not an issue anymore. For example, in Microsoft Word 2019, the default line spacing is 1.08 spaces, and the default paragraph spacing is 8 points. If you are not a proficient user of Word, you may think that you are stuck with this spacing. However, if you use the *Tell me what you want to do* . . . search feature located on the Word toolbar or think logically that the controls for line and paragraph spacing would be the Paragraph settings (found on the Home ribbon), you can make changes quickly.

## Take Advantage of Built-In Styles and Themes

Word processing programs also offer a variety of styles, document themes, and templates that you may use to ensure consistency in your documents. The built-in styles in Word 2019 are particularly useful not only to ensure consistency but also to create a table of contents. If you use the styles (or create your own using the Styles tool), Word can use them to automatically generate a table of contents. Styles also let you use Word's outline view (Exhibit 2-11) to move text just by clicking and dragging the heading to a new location in the outline. If you use the themes and templates, though, be aware that many of these have specially set formatting for line and paragraph spacing, bullets, and alignment. You can manipulate these settings to meet your preferences, but if you are not comfortable doing so, you may find it easier to

**Exhibit 2-11** Illustration of Microsoft Word's Outline View Using Styles



Source: Microsoft Word 2019

create your own formatting. Again, the *Tell me what you want to do...* search feature can help you make these changes.

## Explore Other Interesting Features

Microsoft Word 2019 offers the following additional features. If you use other word processing software, you may have access to similar features, as well.

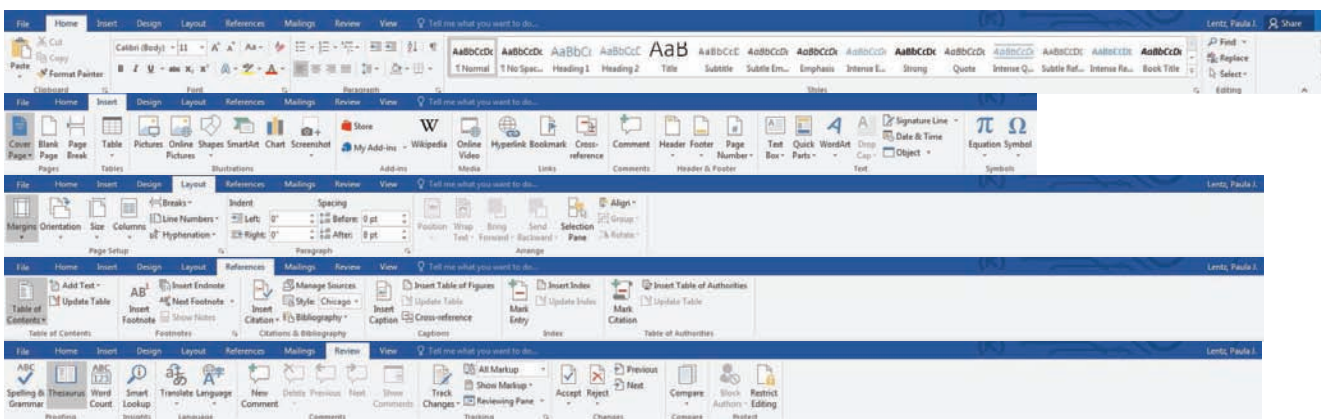
- Equation builder: Lets you write equations.
- Quick Parts (also called Quick Words and AutoText in other software): Lets you create a collection of information that you frequently use so that you do not have to retype the information every time you create a document.
- Word Count: Allows you to keep track of your document's length.
- Collaboration: Enables you to merge, view, or compare multiple documents.
- Digital Signature: Validates the authenticity of the writer much like the signature on a printed document.
- Smart Art, Clip Art, Charts: Lets you create appealing, informative visuals.
- Multiple Save options: Allows you to save your document as a Word file, a .pdf, or an .html file.

Exhibit 2-12 shows the various ribbons and their tools in Word 2019. Some people may find it useful to take courses to learn how to use word processing software, but many learn successfully by exploring the software and using the *Tell me what you want to do...* feature to accomplish their tasks.

## Save Your Document Correctly

If your readers are getting printed copies of your document, you can save your file in whatever software format you are using. However, if your readers will view your document electronically, you need to save it in a format that your readers' software will recognize. For instance, Word 2019 files save as .docx files. However, you may find that some of your readers are still using older versions of Word that recognize only .doc files, which means they will not be able to open your file without first downloading a special utility program. To accommodate this reader, you will need to do a File > Save As and save your document as a .doc file—though if you save your .docx file as a .doc, you may lose some of the formatting from the themes or Smart Art not recognized by earlier versions of Word.

**Exhibit 2-12** Illustration of the Many Tools in Microsoft Word 2019



Source: Microsoft Word 2019

If your reader's software is not compatible with your current version of Word, you can save your document as a .pdf (portable document format) file so that your reader can open it with the formatting preserved. As with the actual composing process itself, saving your documents is an audience-centred effort. You don't want your reader to be angry and frustrated at not being able to open your documents, nor do you want to spend time (and the reader's time) backtracking to save the document in another format and then resending it.

## Use Speech Recognition Tools

If you have mobility issues or find it easier to talk through your thoughts as you draft, you may want to consider using a speech recognition tool. You train the software to recognize your voice and speech patterns so that it can enter text in your document as you speak. Some programs, such as Dragon Naturally Speaking, can be purchased, whereas Google Chrome's Dictation App or Microsoft's Windows Speech Recognition (All Programs > Accessories > Ease of Access > Windows Speech Recognition) can be accessed from your computer without an additional purchase.

## Revising

Getting your draft ready for your reader requires going back over it carefully—again and again. Do you say what you mean? Could someone misunderstand or take offence at what you have written? Is your information organized effectively? Is each word the right one for your goals? Are there better, more concise ways of structuring your sentences? Can you move the reader more smoothly from point to point? Does each element of format enhance readability and highlight the structure of the contents? When revising, you become your own critic. You challenge what you have written and look for better alternatives. Careful attention to each level will result in a polished, effective message.

Any given message has so many facets that using what professional writers call **levels of edit** may be helpful. The levels this term refers to are **revising**, **editing**, and **proofreading**.

When revising, you look at top-level concerns: whether or not you included all necessary information, whether the pattern of organization is logical and as effective as possible, whether the overall meaning of the message comes through, and whether the formatting is appropriate and helpful.

You then move to the editing level, focusing on your style. You examine your sentences to see whether they pace the information in such a way that the reader can easily follow it, whether they emphasize the right things, and whether they combine pieces of information coherently. You also look at your word choices to see whether they are right for your audience and purpose.

Finally, you proofread, looking at mechanical and grammatical elements—spelling, typography, punctuation, and any grammar problems that tend to give you trouble. Editing functions that are available in your word processing program can help you with this task.

Getting feedback from others is also helpful during the revision stage. As you may well know, finding weaknesses or errors in your own work is difficult. Seek assistance from willing colleagues, and if they give you criticism, receive it with an open mind. Hearing this feedback from them is better than hearing it from your intended readers when costly mistakes may have already been made.



## Communication Matters

### Why Accurately Proofreading Your Own Work Is Difficult

You have likely had the experience of writing what you think is the perfect document only to have someone point out a misspelling or other error. You are not alone. Proofreading your own work is difficult, and there is a reason for it.

Psychologist Tom Stafford explains that when you write and edit, your brain engages in a high-level process called *generalization*. That is, it generalizes the simple parts of the message, such as letters and words, so that it can spend its time on more complex parts of the message, such as content. As a result, when you proofread your own work, your brain leads you to see words as you expect to see them, not to see what is typed on the page. When you proofread others' work, you have no expectations regarding what you will see on the page, which makes it easier for you to pay attention to details and see errors.

Stafford says that to improve your ability to proofread your own work well, you need to make it visually unfamiliar so that your brain does not draw on what it has generalized—that is, change the colour or the font or print the document and edit on paper rather than on screen.

**levels of edit** Different approaches to correcting text, usually applied at different stages of the writing process—primarily revising, editing, and proofreading.

**revising** Reviewing and correcting or changing a document.

**editing** Correcting, condensing, or otherwise modifying text for publication.

**proofreading** Correcting printer's proofs or other written or printed material and marking any errors.



**Successful writers often seek others' perspectives on important documents.**

© Image Source/Stockbyte/Getty Images

**L02-5** Describe the use of computer tools to facilitate revising messages.

## Using Computer Tools to Revise and Edit

Word processing software also offers several tools for proofing and editing your documents. If your editing consists of reading from the computer monitor or printing a document and reading it in hard copy, you may be missing issues or errors that could be quickly fixed. Again, we use Word 2019 as our reference to illustrate helpful editing tools, but these tools are readily available in other software. Remember, though, that while your software may help you identify some of the things you need to revise, you still need to be able to revise for issues your software does not detect.

### The Find Feature

The Find feature (Ctrl+F, or Home > Editing > Find) can search for and highlight parts of the text you want to check. Let's say that you are writing a letter and you know you have a problem with comma splices. You could have the software find and highlight every comma in the letter. Then you can review the highlighted commas and fix any errors.

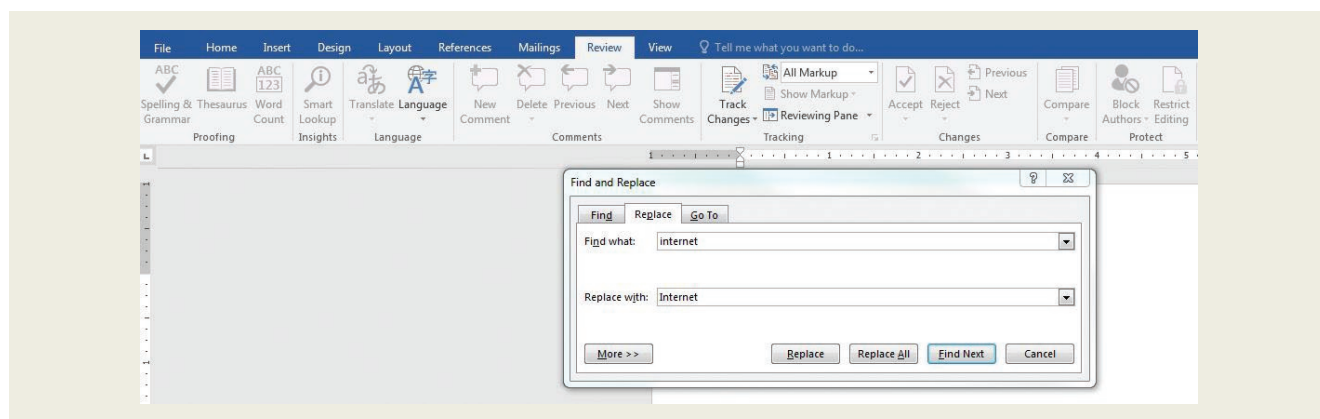
### The Find and Replace Feature

This feature (Ctrl+H, or Home > Editing > Replace) allows you to make multiple changes simultaneously (Exhibit 2-13). You can find and replace words or text formatting. If, for example, you spelled *internet* with a lowercase *i* and want to capitalize it, you would tell Word to search for all instances of *internet* and replace them with *Internet*. You can also find and replace line spacing, paragraph formatting, tabs, styles, and special characters much more efficiently than selecting all individual instances of a word, sentence, or paragraph and making changes one at a time.

### Comments and Track Changes Features

Though these features can be used separately, they are often used together when writers collaborate on documents, as Chapter 11 explains. However, you may also want to use them to leave comments for yourself (e.g., *Check the date of this source*) or to keep a record of your changes. Because you can accept or reject the changes, you are not committed to them, and because you still have a record of your earlier work, you can simply reject a change and revert to your original version.

**Exhibit 2-13** Illustration of the Find and Replace Feature in Microsoft Word 2019



Source: Microsoft Word 2019

## Auto Correct Features

As we discuss in Chapter 5, the Auto Correct feature lets you enable the software to recognize common errors you may make. For example, if you type quotation marks inside a period (e.g., ").), you can set the auto correct feature to always correct your text to read . " instead.

## Spelling Checkers

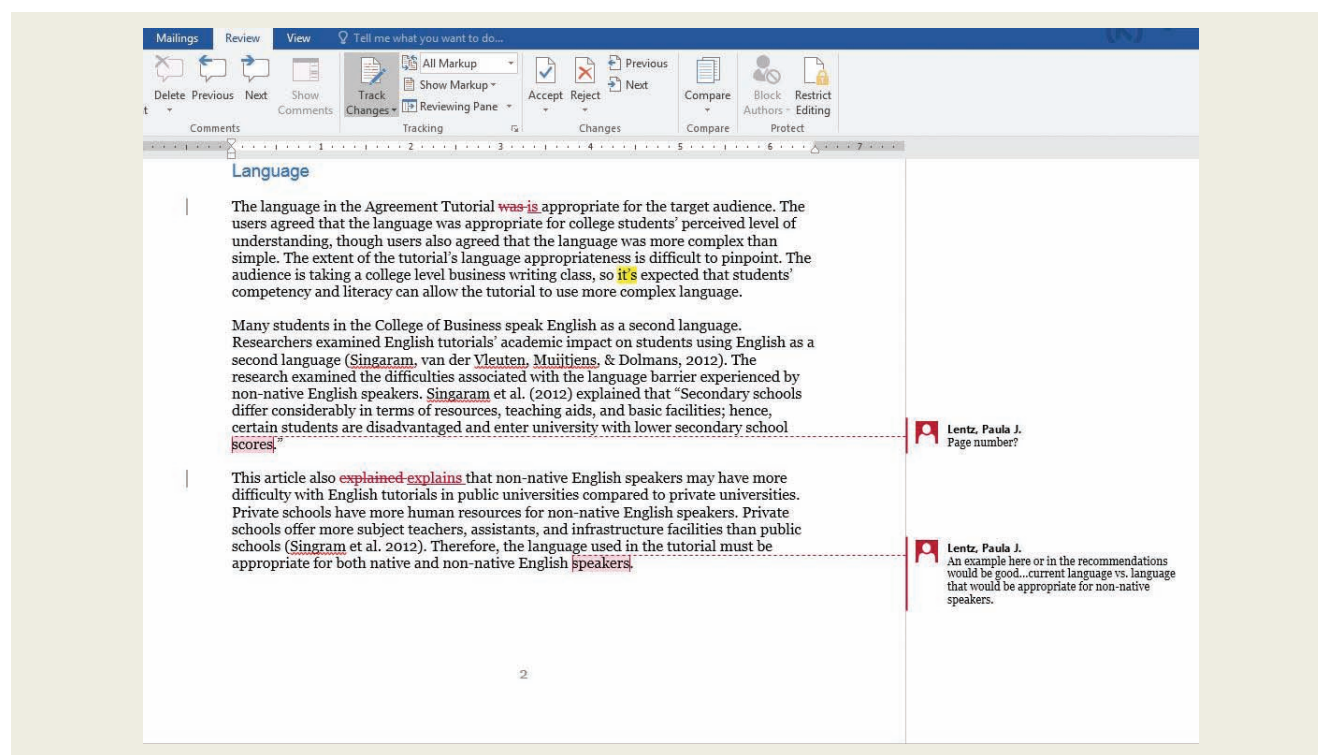
Along with Quick Parts, AutoText, and QuickWords, spell checkers are tools business writers rely on daily. However, they are only effective at identifying words that are not in their dictionary. Therefore, spell checkers will not identify as errors words that are spelled correctly but used in the wrong sense. For example, a spell checker will not identify word choice errors such as *compliment* for *complement* or *imply* for *infer*. A spelling checker also may miss errors such as *desert* for *dessert* or misused words such as *good* for *well*. Therefore, careful proofreading is still in order after a document has been checked with a spelling checker. To access the spelling checker in Word 2019, select the Review ribbon and then ABC Spelling & Grammar or press F7.

*When using online resources and those included in word processing software, be aware that most reflect U.S. spelling and usage, which may not be acceptable in a Canadian context. The accepted authority for Canadian spelling is the Canadian Oxford Dictionary, 2nd edition.*

## Thesaurus Software

Microsoft Word 2019 also includes a Thesaurus that you can access by going to the Review ribbon and selecting Thesaurus. You can also find a Thesaurus online. The Merriam-Webster website ([www.m-w.com](http://www.m-w.com)) includes a free online thesaurus, as well as a dictionary (U.S. spelling) and other tools.

### Exhibit 2-14 Illustration of the Comments and Track Changes Features in Microsoft Word 2019



Source: Microsoft Word 2019



## From the Tech Desk

### Backing Up Frequently Is the Writer's Responsibility

Most writers know how difficult it is to create a document, much less re-create it, so they are willing to spend a little time to protect their investment. In the Save Options dialogue box of Word (File > Options > Save > Save Documents), a writer can set up the program to have Word always create a backup file, to

run these backups every 10 minutes, and to do it in the background. This backup helps protect you from losing your work if your computer goes down unexpectedly, whether from crashes, power outages, accidents, or viruses.

To protect your documents further, you might want to vary the backup media you

use so that if your computer is damaged or becomes infected with a computer virus, you still have copies of your files. This media could range from simple backups on disks or USB drives to backups at offsite locations. You might also back up your work by saving it to online services such as Dropbox or Google Drive.

Word Options

General  
Display  
Proofing  
**Save**  
Language  
Ease of Access  
Advanced  
Customize Ribbon  
Quick Access Toolbar  
Add-ins  
Trust Center

Customize how documents are saved.

**Save documents**

Save files in this format: Word Document (\*.docx)

☒ Save AutoRecover information every 10 minutes

☒ Keep the last AutoRecovered version if I close without saving

AutoRecover file location: C:\Users\campagm\AppData\Roaming\Microsoft\Word\

☐ Don't show the Backstage when opening or saving files with keyboard shortcuts

☒ Show additional places for saving, even if sign-in may be required.

☐ Save to Computer by default

Default local file location: C:\Users\campagm\Documents\

Default personal templates location:

**Offline editing options for document management server files**

Saving checked out files to server drafts is no longer supported. Checked out files are now saved to the Office Document Cache.

[Learn more](#)

Server drafts location: C:\Users\campagm\Documents\SharePoint Drafts\

**Preserve fidelity when sharing this document:** IMFM Final Assignment 2020 (Revised w...

☐ Embed fonts in the file

☐ Embed only the characters used in the document (best for reducing file size)

☒ Do not embed common system fonts

OK Cancel

Source: Microsoft Word 2019

## Grammar and Style Checkers

Grammar and style checkers identify possible problems and give suggestions for revision. Your responsibility is to decide whether the possible problem *is* a problem and whether the suggestion is the best solution. Making this decision requires that you have a good understanding of basic grammar (see Reference Chapter A).

In addition to checking grammar, style, word usage, and punctuation, Word 2019 reports readability indexes. It also analyzes sentence structure, suggesting that you use simpler sentences, vary the sentence beginnings, use more or fewer prepositional phrases, and make various other changes. Grammar and style checkers also identify possible problems with specific words that might be slang, jargon, misspelled, misused, negative, or difficult for readers to understand. A complementary feature, Word Count, reports statistics for number of pages, words, characters, paragraphs, and lines. An example of the interactive use of one grammar checker is shown in Exhibit 2-15.

Recent versions of grammar and style checkers are much more flexible than older versions. In Word 2019 you can customize your grammar and style settings to fix common errors or to adapt your writing to your company's style preferences. To customize your settings in Word 2019, go to File > Options > Proofing.

Grammar and style checkers are definitely important for the business writer. As with all tools, the more appropriately you use them, the better they work.

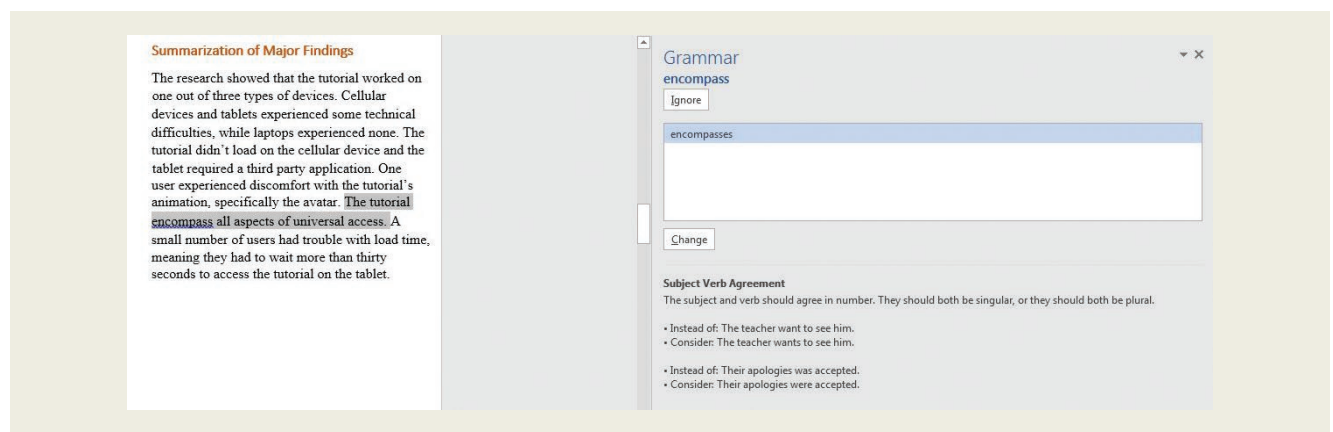
## Information Rights Management (IRM)

Many writing programs now give writers the ability to specify how their documents are shared, controlled, and used. As you can see in Exhibit 2-16, Word 2019 offers several levels of security for a document.

Writers can determine how their documents are shared by specifying who can read, change, or have full control over them. Additionally, the writer can set an expiration date on these permissions. Not only do these features help businesses prevent sensitive information from getting into the wrong hands, either accidentally or intentionally, but they also give writers control over documents once they leave their computers. If only certain people have permissions, forwarded and copied files will be protected from unauthorized use.

IRM tools have prompted many businesses to establish practices or policies on the kinds of permissions required for various types of information to protect their intellectual property.

**Exhibit 2-15** Illustration of a Spelling and Grammar Checker in Microsoft Word 2019



Source: Microsoft Word 2019

## Exhibit 2-16 Illustration of Security Options in Microsoft Word 2019



These tools also help decrease inbox clutter because they force writers to think about who really needs the document and for how long.

Technology is certainly an important tool for constructing messages. While word processing is the writer's primary tool, a wide variety of other tools can help with the planning, gathering and organizing, presenting, drafting, and revising and editing. By using the tools discussed in this section, you will find that your writing process is more efficient and your writing more polished.

The remaining sections of this chapter describe specific purposes and traits of different message types. Chapter 4 provides in-depth advice about their physical design. No matter what you're writing, taking time to make careful formatting decisions during your writing process will significantly enhance your chances of achieving your communication goals.

---

**L02-6** Describe the purpose and form of letters.

---

## Letters

Letters are the oldest form of business messages. The ancient Chinese wrote letters, as did the early Egyptians, Romans, and Greeks. In fact, American businesspeople used letters as early as 1698 to correspond about sales, collections, and other business matters.<sup>2</sup>

From these early days letters have continued to be used in business. Although their use and purpose have evolved as other business communication genres have developed, they are still the best choice for many communication tasks.

## Letters Defined

The general purpose of a letter is to represent the writer and their topic rather formally to the recipient. For this reason, **letters** are used primarily for corresponding with people outside your organization. When you write to internal readers, they are often familiar to you—and

**letters** Printed documents, usually sent via mail, to convey information to recipients who are outside your organization.

even if they are not, you all share the connection of being in the same company. Your messages to such audiences tend to use less formal media.

However, when you write to customers, to suppliers, to citizens and community leaders, and to other external audiences, you will often want to present a formal, polished image of your company by choosing the letter format, complete with an attractive company letterhead and the elements of courtesy built into this traditional format. Once you have established a less formal relationship with your audience, you may find you conduct your business through emails, phone calls, instant or text messaging, and social media. However, especially when corresponding with an external party whom you do not know well, a letter is often the most appropriate form to use.

## Letter Form

The format of the business letter is probably already familiar to you. Although some variations in format are generally acceptable, typically these items are included: date, inside address, salutation (e.g., Dear Ms. Smith or Dear Dr. Smith), body, and complimentary close (Sincerely). Other items sometimes needed are an attention line, subject line, return address (when letterhead is not used), and enclosure information. Exhibit 2-17 presents one option for formatting a letter. More options are presented in Chapter 4.

**Exhibit 2-17** Illustration of a Letter in Full-Block Format

The illustration shows a business letter in full-block format. At the top left is the company logo, a stylized 'R' with a green and blue swirl. To the right of the logo is the company name 'RALSTON'S PLUMBING AND HEATING' in bold, followed by the address '2424 Admiral Dr, Melville, SK, S0A 2P0' and contact information: 'P: 555.555.5555 | F: 555.555.5544 | E: ralstons@rph.com'. The date 'March 15, 2021' is on the left. The inside address 'Ms. Diane Taylor, 747 Gateway Avenue, Melville, SK, S0A 2P0' is on the left. The salutation 'Dear Ms. Taylor:' is on the left. The body of the letter consists of three paragraphs: a thank you, an enclosure notice, and a closing statement. The signature 'Jack Ralston' is on the left, with a handwritten signature above it. Below the signature is the typed name 'Jack Ralston' and title 'Owner and President'.

**RALSTON'S PLUMBING AND HEATING**  
2424 Admiral Dr, Melville, SK, S0A 2P0 | P: 555.555.5555 | F: 555.555.5544 | E: ralstons@rph.com

March 15, 2021

Ms. Diane Taylor  
747 Gateway Avenue,  
Melville, SK, S0A 2P0

Dear Ms. Taylor:

Thank you for allowing one of our certified technicians to serve you recently.

Enclosed is a coupon for \$25 toward your next purchase or service call from Ralston.  
It's just our way of showing that we appreciate your business.

We look forward to serving you again. Please be sure to visit our website  
([www.ralstonheatingandplumbing.com](http://www.ralstonheatingandplumbing.com)) or our Facebook page for our latest products, services, and sales.

Sincerely,  
*Jack Ralston*  
Jack Ralston  
Owner and President



**Businesses with multiple locations send many of their internal messages by email as well as by instant and text messages**

© Chad Baker/Jason Reed/Ryan McVay/Photodisc/Getty Images

## Letter Formality

As formal as letters can be, they are not nearly as formal as they used to be. Business messages in general have grown more conversational, and this is true of letters as well as other forms of correspondence.

For instance, in the past, women were always addressed as Mrs. or Miss. Today, women are addressed as Ms. unless you know the reader prefers Mrs. or Miss. In the past, too, if writers did not know the reader's name, wrote to a mass audience, or wrote to someone whose gender could not be determined by the reader's name (e.g., Pat Smith), they might have used a salutation such as To Whom It May Concern, Dear Sir/Madam, or Dear Ladies and Gentlemen. These expressions are now considered impersonal and old-fashioned. More modern options include Dear Human Resources or Dear Pat Smith. Alternatively, writers can omit the salutation, perhaps adding a subject line (a brief phrase stating the writer's main point) instead, much in the same way they would create a subject line in a memoran-

dum or email. Chapter 4 provides more information on placing a subject line in a letter.

Some business writers also consider the use of the terms *Dear*, *Sincerely yours*, and even *Sincerely* outdated or excessively formal. These writers will omit *Dear*, replace *Sincerely yours* with *Sincerely*, omit the complimentary close, or use *Best regards* or some other cordial phrase. Your audience and company culture will determine what is appropriate for you.

Regardless of its formality, the letter should always be regarded as a personal exchange between people as well as a strategic means for accomplishing business goals and building business relationships.

## Memorandums (Memos)

### Memorandums Defined

#### **memorandum (memo)**

A printed document typically used to convey information inside an organization.

Another business genre is the **memorandum** (or **memo**). It is a hard-copy (printed on paper) document used to communicate inside a business. Though in rare cases they may be used to communicate with those outside the business, they are usually exchanged internally by employees as they conduct their work. Originally, memos were used only in hard copy, but their function of communicating within a business has been largely replaced by email. Even so, they still are a part of many companies' communications. They are especially useful for communicating with employees who do not use computers in their work.

Memos can be used for a wide range of communication tasks. For example, as Chapter 12 points out, some memos communicate factual, problem-related information and can be classified as reports. As with the letter, the purpose and use of the memo have evolved as other business communication genres have emerged, but the memo is still an important means for communicating in many organizations.

## Memorandum Form

Memorandums can be distinguished from other messages primarily by their form. Some companies have stationery printed especially for memos, while many use standard or customized templates in word processors. Sometimes the word *Memorandum* appears at the top. But some companies prefer other titles, such as *Interoffice Memo* or *Interoffice Communication*. Below this main heading come the specific headings common to all memos: *Date*, *To*, *From*, *Subject* (though not necessarily in this order). This simple arrangement is displayed in Exhibit 2-18. As the figure indicates, hard-copy memos are initialed by the writer rather than signed, and the memo does not contain a salutation or complimentary closing.

Large organizations, especially those with a number of locations and departments, often include additional information on their memorandum stationery. *Department*, *Plant*, *Location*, *Territory*, *Store Number*, and *Copies to* are examples (Exhibit 2-19). Because in some companies memos are often addressed to more than one reader, the heading *To* may be followed by enough space to list a number of names.

## Memorandum Formality

Because memos usually are messages sent and received by people who work with and know one another, they tend to use casual or informal language. Even so, some memos use highly formal language. As in any business communication, you will use the level of formality appropriate to your audience and writing goals.

**L02-7** Describe the purpose and form of memorandums (memos).



### You Make the Call

Even if all employees have email access, can you think of instances when you would send a memo instead?

### Exhibit 2-18

Illustration of Memo Form Using the MS Word Professional Template

**Lenaghan Financial**

## Memo

**To:** Matthew Lenaghan, President

**From:** Payton Kubicek, Public Relations PK

**CC:** Katherine Lenaghan, Chair

**Date:** May 1, 2021

**Re:** May Meeting of Plant Safety Committee

---

As we agreed at the March 30 meeting of the Plant Safety Committee, we will meet again on May 12. I am requesting agenda items and meeting suggestions from each (etc.) . . .

### Exhibit 2-19

Memorandum Stationery with Special Headings for an Organization with Many Locations

Penny-Wise Stores, Inc.

MEMORANDUM

**To:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**From:** \_\_\_\_\_

**Store:** \_\_\_\_\_

**At:** \_\_\_\_\_

**Territory:** \_\_\_\_\_

**Copies to:** \_\_\_\_\_

**Subject:** Form for In-house Letters (Memos)

This is an illustration of our memorandum stationery. It should be used for written communications within the organization.

Notice that the memorandum uses no form of salutation. Neither does it have any form of complimentary close. The writer does not need to sign the message. He or she needs only to initial after the typed name in the heading.

Notice also that the message is single-spaced with double-spacing between paragraphs.

# Email

Although businesspeople routinely communicate via social media, text messaging, and instant messaging, email remains a primary tool in the workplace. In fact, according to one study of white-collar workers, Americans spend six hours a day (or 30 hours a week) using email.<sup>3</sup>

---

**L02-8** Describe the purpose and form of email.

---

**email** An electronic document sent from one computer user to one or more recipients via a network.

**spam** Unsolicited messages or mass emails.

## Email Defined

It's easy to see why **email** remains popular. In contrast to letters and memos, emails can be used with either internal or external audiences and can vary widely in their types of content and levels of formality. Email addresses are readily available, and anyone can send a message to any email address (or multiple addresses simultaneously), regardless of who provides the email account. The speed at which readers receive a message can also make email more attractive than a letter or a memo. Consequently, businesses continue to use email as a low-cost, quick, and efficient means of communicating with both internal and external audiences either formally or informally. Furthermore, email provides HTML and other formatting options that text messaging, instant messaging, and social media may not, and it does not limit the writer to any number of characters or amount of text. In addition, emails can be archived and filed for easy access to a written record of correspondence.

Email, however, also presents communication challenges. Sometimes people use email to avoid having difficult face-to-face or phone conversations, which is not a good way to accomplish communication goals or cultivate the audience's goodwill. Emails are also easily forwarded and therefore can never be considered confidential. Additionally, many businesspeople deal with **spam**—unsolicited messages or mass emails that are not relevant to their work. Moreover, some writers may assume that an informal email message is not held to the same standards of professionalism, clarity, or correctness as a more formal message might be; as a result, their messages are not received well by their audiences.

Finally, when not used properly, email can be costly. According to one Fortune 100 company, the time employees spent on irrelevant email was costing the company \$909,000 per day and \$236 million per year.<sup>4</sup> It is important, then, that business writers ensure their emails communicate a clear message, cultivate goodwill, and promote a professional image.

## Email Form

When you look at an email, you likely notice that its form contains elements of both memos and letters. For example, emails generally contain a *Date*, *To*, *From*, *Subject* heading structure similar to that of a memo. They may also contain salutations and complimentary closes similar to those found in letters.

Although the various email systems differ somewhat, email format includes the following:

- **To:** This is where you include the email address of the recipients. Be sure the address is accurate.
- **Cc:** If someone other than the primary recipient is to receive a *courtesy copy*, his or her address goes here. Before people used computers, *cc:* was called a *carbon copy* to reflect the practice of making copies of letters or memos with carbon paper.
- **Bcc:** This line stands for *blind courtesy copy*. This line is also for email addresses of recipients. However, each recipient's address will not show in the sent message; that is, recipients will not know who else is receiving a copy of the message.
- **Subject:** This line describes the topic of the message. The reader should get from it a clear idea of what the message is about. Always include a subject line to get your reader's attention and indicate the topic of the message. In the absence of a subject line, a reader may think your message is junk mail or unimportant and delete it.



## Communication Matters

### Email: Your Ticket to a Successful Marketing Campaign

While it is true that businesspeople use email to conduct business within and outside organizations, many businesses use email as part of their marketing strategy.

MarketingCharts (MC) cites a report from BlueHornet in which over 1,800 people ages 18–64 were surveyed about their email use. Many respondents reported not only that they check their emails frequently throughout the day but also that they do

not maintain separate email accounts for marketing or advertising messages. And even those who maintain separate accounts for marketing emails check those accounts frequently.

MC cites additional research indicating that “opt-in emails drive purchases among more Millennials than all paid advertising save for TV ads” and that given a variety of communication channels, email marketing is “second

only to word-of-mouth in purchase influence” among women.

The BlueHornet study indicated the factors that influence the audience’s responses to an email marketing campaign include the subject line and the frequency with which messages are sent. Regardless, the study found that for nearly 75 percent of the 1,800 respondents, email influenced their purchases at least once per month.

- **Attachments:** In this area you can enter a file that you want to send with the message. Attach only files the reader needs so that you do not take up unneeded space in his or her inbox.
- **The message:** The information you are sending goes here. Typically, email messages begin with the recipient’s name. The salutations commonly used in letters (Dear Mr. Dayle, Dear Jane) are sometimes used, but something less formal (Hi, Ron) or no salutation at all is also common. If you know the recipient well, you can use the reader’s first name. If you would normally address the reader by using a title (Ms., Dr., Mr.), address them this way in an initial email. You can change the salutation in subsequent messages if the person indicates that you are on a first-name basis. A friendly generic greeting such as Greetings is appropriate for a group of people with whom you communicate. As we discussed in the section on letters, you’ll want to avoid outdated expressions such as To Whom It May Concern.

Like a letter, an email message often ends with a complimentary close followed by a signature block containing the writer’s name, job title, company, and contact information. Some writers also use the signature block as an opportunity to promote a sale, product, or service. Exhibit 2-20 shows a standard email format.

### Email Formality

A discussion of email formality is complicated by the fact that email messages are extremely diverse. They run the range from highly informal to formal. The informal messages often resemble face-to-face oral communication; some even sound like chitchat that occurs between acquaintances and friends. Others, as we have noted, have the increased formality of reports.

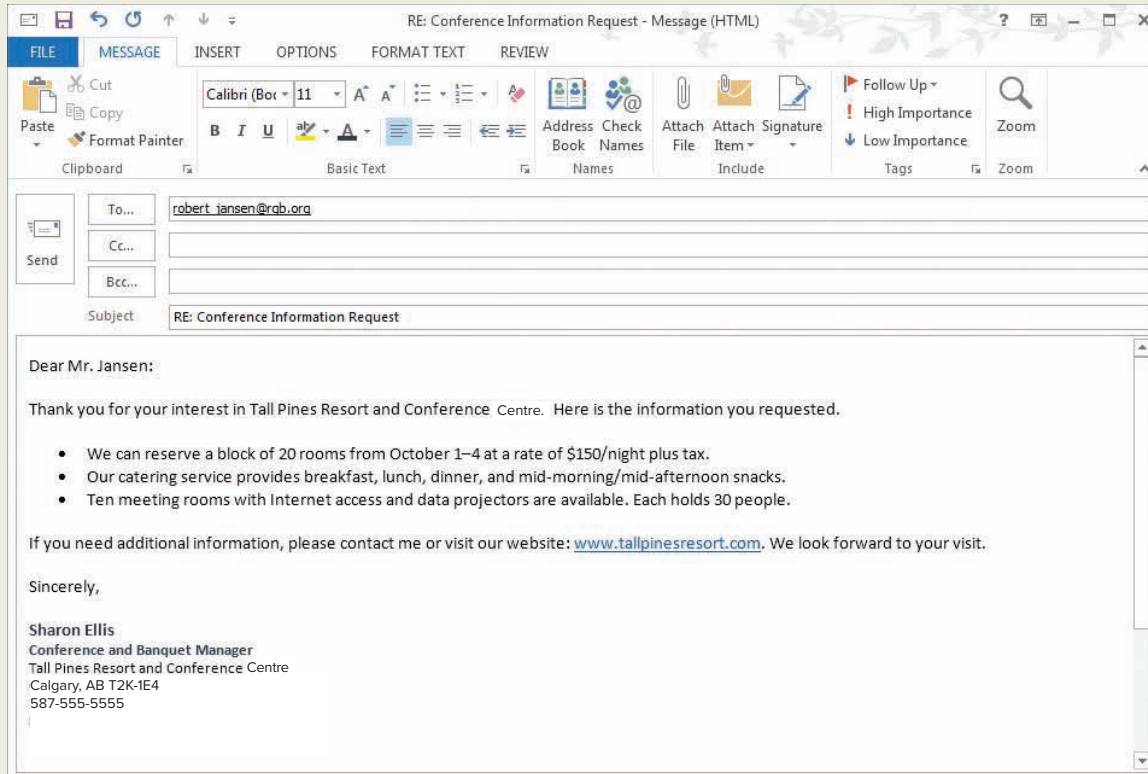
A helpful approach is to view email language in terms of three general classifications: **casual**, **informal**, and **formal**.<sup>5</sup> Your audience should determine which type of language you choose, regardless of your personal style or preference.



*Many businesspeople use their phones to send and receive emails and text messages. With such a small display screen, conciseness and clarity are especially important.*

Hongqi Zhang / Alamy Stock Photo

## Exhibit 2-20 Illustration of Email Form Using Microsoft Outlook



Source: Microsoft Word 2019

**casual** Highly informal language used in talking with close friends in everyday situations.

**informal** Polished communication that is more formal than casual writing but retains some casual qualities.

**formal** Highly structured and more impersonal communication, usually directed toward those of higher status or people the writer does not know.

### Casual

By casual language we mean the highly informal language we use in talking with close friends in everyday situations. It includes slang, colloquialisms (informal expressions), contractions, and personal pronouns. Its sentences are short—sometimes incomplete—and it may use mechanical emphasis devices and initialisms (e.g., LOL, BTW) freely. Casual language is best limited to your communications with close friends. The following is an example of casual language:

**Hey, Cindy,**

**Props for me! Just back from reps meeting. We totally nailed it . . . plan due ASAP. Meet, my office, 10 am, Wed?**

**Brandon**

Use casual language only when you know your readers well—when you know they expect and prefer casual communication. You should also avoid slang, initialisms, emphasis devices, or other casual elements if you are not certain that they will communicate clearly.

### Informal

Informal language retains some of the qualities of casual writing. It makes some use of personal pronouns and contractions. It occasionally may use colloquialisms but more selectively than in casual writing. It has the effect of conversation, but it is polished conversation. Its sentences are short, but they are well structured and organized. They have varied patterns that produce an interesting style. In general, it is the writing that you will find in most of the illustrations in Chapters 8, 9, and 10. You should use it in most of your business email messages,



## From the Tech Desk

### Using Good Email Etiquette Helps Writers Achieve Their Goals

Using proper email etiquette is as easy as applying a bit of empathy to your messages: send only what you would want to receive. The following additional etiquette questions will help you consider more specific issues when using email.

- Is your message really needed by the recipient(s)?
- Is your message for routine rather than sensitive messages?
- Are you sure your message is not spam?
- Have you carefully checked that your message is going where you want it to go?
- Has your wording avoided defamatory or libelous language?
- Have you complied with copyright laws and cited sources accurately?
- Have you avoided humour and sarcasm that your reader may not understand as intended?
- Have you proofread your message carefully?
- Is this a message you would not mind having distributed widely?
- Does your signature avoid offensive quotes or illustrations, especially those that are religious, political, or sexual?
- Is your recipient willing or able to accept attached files?
- Are attached files a size that your recipient's system can handle?
- Are the files you are attaching virus free?

especially when writing to people you know only on a business basis. An example of an email message in informal language is the following:

**Cindy:**

**The management team has approved our marketing plan. They were very complimentary. As you predicted, they want a special plan for the large accounts. They want it as soon as possible, so let's get together to work on it. Can we meet Wednesday, 10 am., in my office?**

**Brandon**

### Formal

A formal style of writing maintains a greater distance between writer and reader than an informal style. It avoids personal references and contractions, and its sentences are well structured and organized. Formal style is well illustrated in the examples of the more formal reports in Chapters 11 and 12. It is appropriate to use in email messages resembling formal reports, in messages to people of higher status, and to people you do not know.

As with any business message, formal or informal, your emails should achieve your communication goal, promote goodwill, and present a professional image. To do this, follow the advice in Chapter 5 for writing clear, courteous messages. You will also want to follow the guides in Reference Chapter A to ensure your messages are expressed correctly.

## Additional Media in Business Writing

Sometimes writers in today's fast-paced, global business world need to communicate more immediately and quickly than a letter, a memo, or an email will allow. Technology provides business writers with many more channels for immediate, quick communication including text messaging, instant messaging, and social networking. Exhibit 2-21 illustrates Old Navy's many uses of social media.

However, as with more traditional business writing media such as letters, memos, and emails, the use of these more immediate channels should be driven by audience needs and expectations as well as the writer's goals and purposes.

### Text Messaging

**Text messaging**, also called short message service (SMS), is, as its name suggests, used for sending short messages, generally from a mobile device. Because the purpose of a text

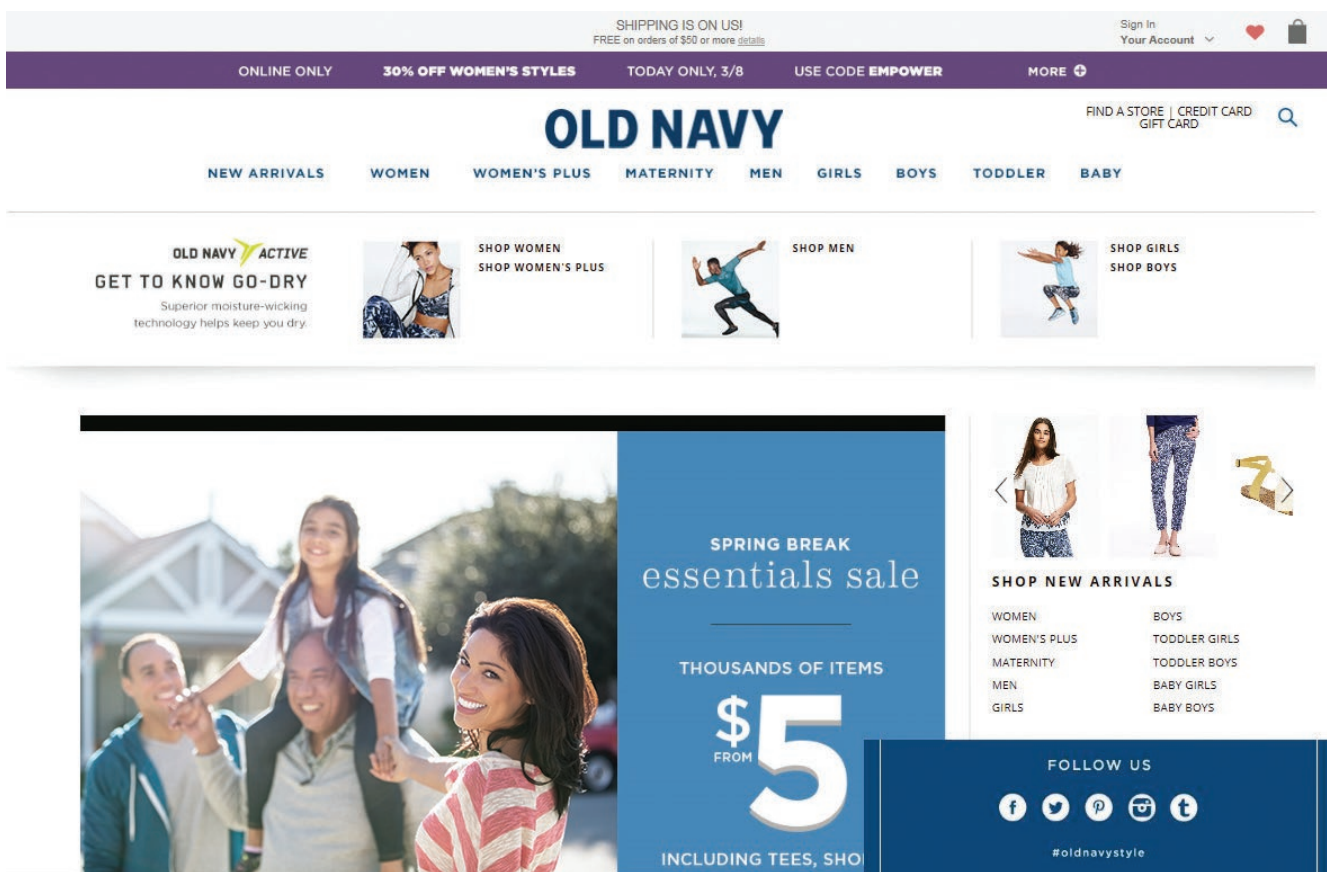
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**L02-9** Discuss the nature and business uses of other communication media.

---

**text messaging** Used for sending short messages, generally from a mobile device.

## Exhibit 2-21 Illustration of Old Navy's Many Uses of Social Media



Source: <https://oldnavy.gapcanada.ca>

message is to convey a quick message, text messages are much shorter than messages conveyed by more traditional forms. Also, mobile service providers may limit the number of characters in a text message.

The need for brevity has led to the use of many abbreviations. In fact, a dictionary of over 1,400 text-messaging abbreviations has been compiled at Webopedia, an online computer technology encyclopedia ([www.webopedia.com/quick\\_ref/textmessageabbreviations.asp](http://www.webopedia.com/quick_ref/textmessageabbreviations.asp)). Some examples include the following:

b4 (before)	NP (no problem)
gr8 (great)	FBM (fine by me)
CU (see you)	TC (take care)
u (you)	HRY (how are you)
BTW (by the way)	TYT (take your time)

In addition to abbreviations, writers use symbols to convey emotions (emoticons and emojis), which can also be found at Webopedia:

:-) standard smiley	:! foot in mouth
:) winking smile	:-( sad or frown
:-O yell	((H)) hugs
😡 angry	😊 happy
😮 surprise	😞 bored

Whether and when these emojis and emoticons are used depends on the writer's relationship with the audience.

Good business writers will compose text messages that not only convey the writer's message but also allow for brief responses from the receiver. Let's say, for example, you've learned that an important visiting customer is a vegetarian and you have reservations for lunch at Ruth's Steakhouse. You need to let your boss know this location is not going to work—before the lunch meeting. However, the boss is leading an important meeting in which a phone call would be disruptive and inappropriate, so you decide to send a text message.

**Marina Smith is a vegetarian. Where should we take her for lunch today?**

Although your message does convey the major fact and is only 77 characters, counting spaces, it forces the recipient to enter a long response—the name of another place. It might also result in more message exchanges about availability and time.

A better version might be this:

**Marina Smith is a vegetarian. Shall we go to 1) Fish House, 2) Souplantation, 3) Mandarin House? All are available at noon.**

This version conveys the major fact in 130 characters and allows the recipient to respond simply with 1, 2, or 3. As the writer, you took the initiative to anticipate your reader's needs, identify appropriate alternatives, and then gather information—steps that are as important with text messaging as they are with other messages. If your text messages are clear, complete, concise, and have a professional and pleasant tone, you will find them a valuable tool for business use.

## Instant Messaging

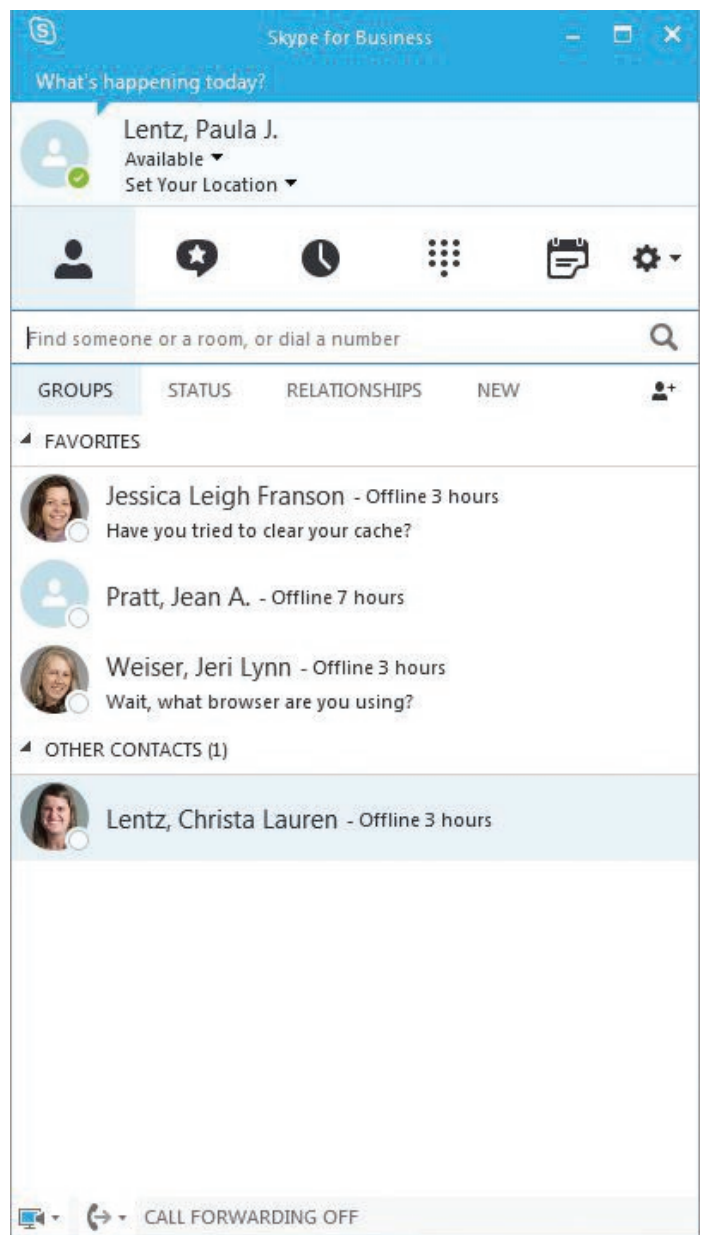
Instant messaging, commonly referred to as IM-ing or online chatting, is much like telephone conversation in that parties communicate in real time (instantly). It differs primarily in that it is text-based (typed) rather than voice-based communication, though voice-based instant messaging is possible. Many writers will use the same abbreviations and emoticons when instant messaging as they would in text messaging. Here again, the use of these devices depends on your audience and purpose. Exhibit 2-22 shows the Skype for Business instant messaging tool.

Because **instant messages** are similar to phone conversations, you should write them much as you would talk in conversation with another person. Whether the person is a friend or your business associate, your language should reflect this relationship. In business situations you should consciously direct the flow toward your objective and keep your language and content professional.

**instant messages** Online communication that takes place in real time (instantly).

### Exhibit 2-22

Example of the Skype for Business Instant Messaging Tool



Source: Skype.com; Courtesy Jessica Leigh Franson; Courtesy Jeri Lynn Weiser; Courtesy Christa Lauren Lentz.

## Social Media

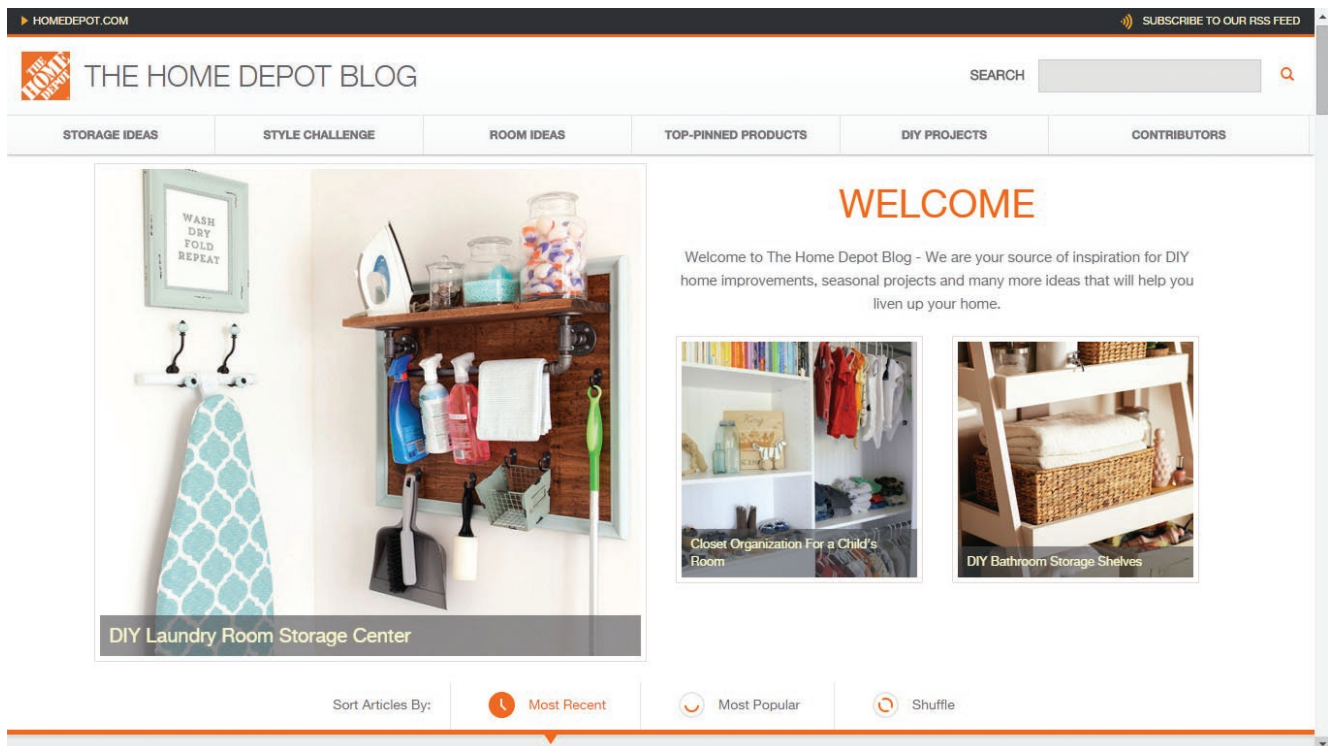
**social media** Websites and applications that enable users to create and share content or to network with each other.

You are probably familiar with such **social media** sites as Facebook, Twitter, Pinterest, Instagram, and LinkedIn. Perhaps you have a blog where you keep an online diary or journal that you share publicly. Although you may use these sites to connect with friends, family, or classmates, many business writers also use them to connect with clients, customers, colleagues, and supervisors, as they answer questions, promote products, network with other professionals, or interact briefly with co-workers. Business professionals, then, are using social networking sites for purposes that are likely very different from your purpose in using them (see the corporate blog in Exhibit 2-23).

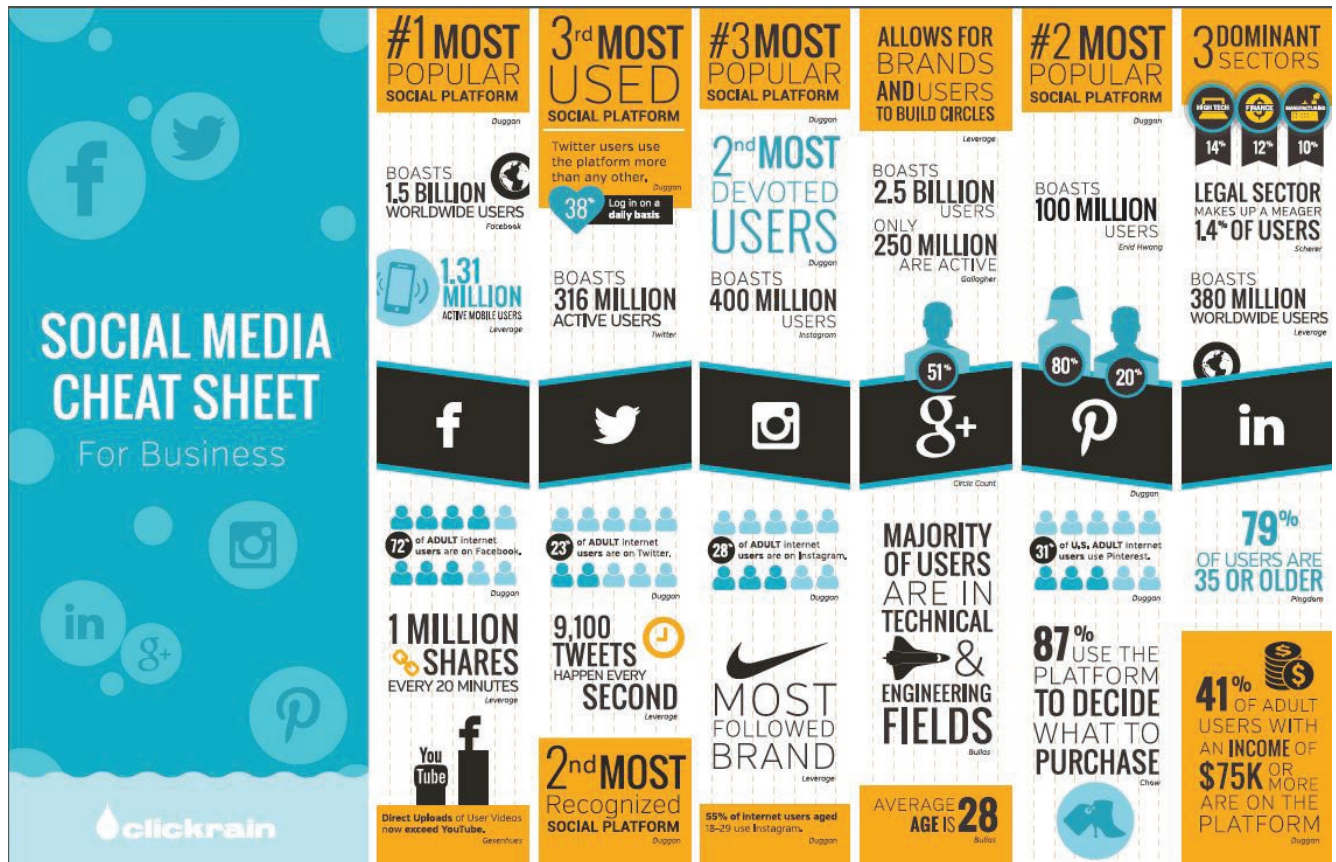
Generally, the messages on social networking sites are brief; Twitter, for example, restricts messages to 140 characters. As with text messaging, messages must not only be brief but concise and clear. If you have only so much space for your message, you need to make sure your reader immediately knows your point and has enough detail to act on your message. Therefore, messages on social media sites should begin with your main point (what you need your reader to do, think, feel, or believe as a result of reading your message) and then follow with details in order of importance.

Whatever form of social media you use, you want to be sure you analyze your audience, purpose, and context before you write. You wouldn't, of course, want to spend much time posting to Instagram if your audiences primarily use Twitter and Pinterest. And you want to be sure your tone and style are appropriate. As you can see in Exhibit 2-24, the audience

**Exhibit 2-23** Illustration of a Corporate Blog



Source: <https://www.homedepot.ca/>



**Source:** Click Rain, <http://clickrain.com/blog/>. Copyright © 2016 by Click Rain. All rights reserved. Used with permission.

demographics vary widely among the various types of social media channels. Knowing your audiences will help you use the social media channels that best reach them.

In addition, because the messages on these sites are public, you never want to use language or a tone or writing style that you would be embarrassed to have your boss see, that may have legal implications, or that might get you fired. And if you currently have a page on a social networking site where family and friends are your audience, you will want to remove any pictures or language that you wouldn't want a prospective employer, current employer, co-worker, customer, or client to see. No matter how private you believe your page to be, you can never know what your friends and family are sharing with other people.

In fact, cleaning up your social media accounts may actually help you during the job search. In one study, most employers said they check social media sites during the hiring process. While it was true that employers said they would not consider a candidate whose social media sites showed inappropriate photos, drug or alcohol use, poor communication skills, negative comments about an employer, or discriminatory language, they also said they looked favourably on candidates whose sites demonstrated evidence of job qualifications, creativity, professionalism, good communication skills, and the potential to fit into the company's corporate culture.<sup>6</sup>



### You Make the Call

Should companies allow employees to use social media at work for personal reasons?



# Communication Matters

## Do U Txt?

Odds are you've sent text messages using standard texting abbreviations. If you do this frequently, do you wonder whether your common use of text messaging has compromised your understanding of standard English conventions and usage? A study in *New Media and Society* indicates that tweens' use of texting language may affect their use of standard

English. Though this is only one study, its implications are interesting in that it underscores the importance of not becoming so comfortable with one style of writing or one technology that we neglect to tailor our messages to our audiences and communication goals.

Texting is used in business every day—and rightly so, given its speed and efficiency.

Standard English usage and spelling, though, are still expected. If you don't know your audience or context well enough to know whether you can use a smiley face or text-message speak, you'll want to use a more standard writing style. Otherwise, the response you get might be "C U L8r."

Regardless of the type of business messages you send, remember that on the job, companies often monitor employees' computer activity. They can detect excessive use, inappropriate or unethical behaviour, disclosure of proprietary information, use of sexually explicit language, and attachments with viruses. Companies' monitoring systems also have features that protect the company from legal liabilities. As a business professional, you must know your company's computer use policy and avoid writing anything that would reflect poorly on you or your company, or put you or your company at risk.

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**L02-10** Describe how technology will continue to impact communication in the future.

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## A Look to the Future

Given the recent explosion of communication-related technologies, you can anticipate further rapid advancements in how businesses use technology to support or enhance communication.



***Smaller, smarter technology lets people be mobile in their work.***

© Jose Luis Pelaez Inc/Blend Images LLC

For example, innovative social media sites such as Pinterest, Snapchat, Twitter, TikTok, and Instagram are continually being developed as businesses seek new and creative communication channels to help them achieve their business goals. And mobile applications, such as those that let people photograph checks and then use the photograph to deposit the funds into their bank accounts, are changing how people access and use companies' products and services.

In addition, **cloud computing** continues to change the way business communicators access and store their software and their work. For instance, because software and information are stored on websites—in the **cloud**—rather than on the computer, nearly everyone has access to the software programs (e.g., Microsoft Word) used most frequently to communicate in business. Because cloud applications have no system requirements and require no software on the user's computer, a current challenge for businesspeople is remembering to back up data just as they would if they were working locally from their own computers.

Chapter 12 discusses more thoroughly how technology has increasingly facilitated collaborative writing in the workplace through means such as Dropbox and Google Drive/Google Docs.

Whatever technologies develop, human minds will still need to control communication using good judgment and skill. As Chapter 1 points out, the need for effective problem solving through skilful use of technology is dramatically increasing. Businesspeople who use technologies in ways that promote clear, professional communication will be assets to their companies and increase their odds of success in their careers.

**cloud computing** Services that can be accessed and used over the Internet but that do not require active management by the user.

**cloud** Servers that are accessed over the Internet, and the software and databases that run on those servers.



## Power Charge Your Professionalism: Use the Right Word (Part II)

Select the word that completes each sentence below. The choices represent words that are sometimes confused, but as a savvy businessperson, you will want to know how to use them to project your best professional image. You'll find these words listed in Reference Chapter A, but to find the definitions, you will want to use a dictionary.

1. Ling is conducting the training sessions to (ensure/insure) all employees know how to use the new intranet portal.
2. Once you (except/accept) the terms of the license agreement, you can download your new software.
3. Even though the instructions did not (implicitly/explicitly) provide a deadline, everyone assumed the forms were due at the end of the month.
4. Did Rick's email (imply/infer) that we would all be getting a raise this year?
5. Last Thursday Kerstin (lead/led) the hospital's board of directors on a tour of the remodelled emergency room.
6. Business letters are usually sent on company letterhead, but personal letters are usually sent on (plane/plain) paper.
7. Paying extra on a loan (principal/principle) each month can help you pay off the loan more quickly.
8. Even though we send most of our messages electronically, we still use (stationary/stationery) for our printed messages.

### Choosing the right word is important because . . .

- Using the right word is essential if you want your sentences to be clear.
- Using the right word lets you portray yourself as an educated, competent businessperson.

## Key Terms

planning 28	electronic calendar 34	memorandum (memo) 48
drafting 28	database tools 35	email 50
revising 28	outlining or concept-mapping program 36	spam 50
recursive 28	statistical programs 36	casual 52
business goals 29	multimedia presentations 36	informal 52
writing goals 29	online publication 38	formal 52
analyze the audience 29	levels of edit 41	text messaging 53
brainstorm 31	revising 28	instant messages 55
direct order 31	editing 41	social media 56
indirect order 31	proofreading 41	cloud computing 59
genres 32	letters 46	cloud 59
project planning tools 33		

## Critical-Thinking Questions

1. Explain why writing can be more difficult than other forms of communication. **LO1**
2. Describe ways in which the writing process might be recursive. **LO2**
3. Explain how technology can help the writer with both creative and tedious writing tasks. **LO2, LO3, LO4, LO5**
4. Identify specific software tools that assist with constructing written messages. Explain what each does. **LO3**
5. Word processing programs are the writer's primary tool. Identify five basic features and two advanced features useful to business writers. **LO3, LO4, LO5**
6. Discuss the advantages and disadvantages of spell checkers and grammar and style checkers. **LO5**
7. Brainstorm some practices or policies that businesses might develop for using the information rights management (IRM) tool effectively. **LO5**
8. How have text messaging or other technologies affected your writing? **LO2, LO9**
9. How will technology continue to affect business writing? **LO10**

## Skills-Building Exercises

1. Investigate your school and/or local libraries to determine what current (or future) computer sources will help you find information about businesses. Report your findings to the class.
2. Compile an annotated list of at least 10 websites with good links to sources of business information (e.g., labour statistics, stock market trends). Three of these links should be for local business information.
3. Select a multimedia technology, and as your instructor directs, write a memo discussing considerations for accommodating audiences with special needs (e.g., those with visual, hearing, or mobility impairments).
4. Choose a feature from your word processor (such as index, table of contents, templates, or citation manager) that you have not used much. Learn how to use it and create an example

of its use in a business document. Write a brief description of its application and then teach your classmates to use the feature.

5. From a current business magazine, find an article that relates to communication in business. As your instructor directs, write a one-paragraph reaction to it and post it to a blog, post it to the Comments section of an online article, or submit your reaction in memo format.
6. Find a recent news article about a company's unsuccessful use of social media. As your instructor directs, write a memo or email in which you describe the situation, analyze what led to the failure of the message, and offer suggestions for what the company should have done differently.