

# Chapter 8: Writing Business Documents

## Overview

This chapter provides details about writing letters, memos, short reports, e-mail, and business reports. Be sure to point out the numerous examples throughout the chapter. Students will find additional formatting guidelines in the next chapter and in other reference books.

## Lecture Notes

### A. Business Letters

Business letters are used to communicate with people outside the organization; they are written from the reader's perspective using the "you" approach. *Review the sample paragraphs and letters that are found in this section of the text.*

1. **Positive Letters** are the most pleasant type of letter to write or receive; they say "yes" or present good news.
  - a. Types of positive letters include orders, granting a refund or adjustment, response to an inquiry, or a goodwill message.
  - b. The writing approach to use is the direct or deductive approach; the good news (main idea) is presented first.
    - Opening paragraph begins with goodwill and information
    - Body paragraphs provide details
    - Closing paragraph includes positive statement and request for action
2. **Routine or Neutral Letters** exchange day-to-day information; they are written more often than any other type.
  - a. Types of routine letters include requests for information and responses to information requests.
  - b. The writing approach to use is the direct or deductive approach because the reader is expected to be receptive to the message.
    - Opening paragraph presents the main point.
    - Body paragraphs include facts to support the need for information.
    - Closing paragraph emphasizes the main point, asks for action, and provides contact information.
3. **Negative Letters** convey a "no" response or some other bad news; they are also referred to as unfavorable letters.
  - a. Types of negative letters include refusal to send information, refusal to give assistance, a problem with an order, or refusal to grant action.
  - b. The writing approach to use is indirect or inductive. It is used because the sender may be uncertain as to how receptive the reader will be to the information that is presented.
    - Opening paragraph is a buffer setting the stage for the negative news, but it shouldn't be too wordy.
    - First body paragraph includes the rationale for the refusal, presenting the facts related to the philosophy of the business and the reader's viewpoint.
    - Next body paragraph conveys the bad news (after reasons have been given).

- Closing paragraph asks for action and ends with a pleasant close

4. **Combination Letters** say “yes” for only part of what is requested and “no” for the other part.

- a. Types of combination letters include a partial order being filled or a partial response to an information request.
- b. The writing approach should begin with the positive aspects of the message.
  - Opening paragraph is the “yes” response; be careful not to lead the reader to thinking “yes” is the total response.
  - Body paragraphs support the positive and negative aspects; be logical about which facts relate to which answer.
  - Closing paragraph should be positive and forward-looking; include contact information.

5. **Persuasive Letters** present positive information to the reader, but they also request the reader take some action.

- a. Types of persuasive letters include special requests for assistance or information and marketing of goods, services, or ideas.
- b. The writing approach most commonly used is called Attention-Interest-Desire-Action (AIDA).
  - Opening paragraph gets the reader’s attention; sometimes it begins with a question.
  - Body paragraphs emphasize the reason the reader should respond positively to the request.
  - Closing paragraph explains action and appeals to reader’s interest.

6. **Merged Letters** can be defined as correspondence with some identical parts sent to more than one person or company (without rekeying the repeated information).

- a. Personalized repetitive letters are the same letter sent to different people with their own address and personal information; they appear as if they were individually created.
- b. Letters with variable information insert personalized information throughout the letter. The constant information is the wording that remains the same in all letters; the variables represent the personalized information. These letters are created using fill-in fields or data sources/databases.
- c. Letters from form paragraphs combine standard paragraphs to make different letters; each letter is personalized as if it were individually created.

## B. Memoranda and Short Reports

1. **Memoranda or memos** are commonly used forms of internal communication; they are sent within the organization.

- a. A favorable memorandum is written using a direct writing approach. *The same principles used for favorable letters can be applied to memoranda.*
- b. An unfavorable memorandum carries a “no” response; use an indirect writing approach. *The same principles used for negative letters can be applied to memoranda.*

- c. A persuasive memorandum seeks a positive response from the reader; the AIDA approach is used when writing. *The same principles used for persuasive letters can be applied to memoranda.*
2. An **Informal or Short Report** is an internal document to transmit information in a few pages—no more than 4-7.
- a. Types of informal, short reports present business information as a proposal, feasibility study, or progress report.
  - b. Acceptable formats include a memorandum, letter, or manuscript.
  - c. The writing approach may be direct or indirect; it depends on the message.

### C. Electronic Mail

This form of communication is quickly becoming the typical way of sharing information inside an organization and with contacts outside of the organization. Advantages of using e-mail include:

- An e-mail message is focused, short, and to the point.
- The message is transmitted immediately over a network.
- The cost of communicating decreases with the use of e-mail.
- E-mail provides a relatively easy way to send and receive information.

1. **Fundamentals of Writing E-Mail Messages** should be applied.

- a. Conciseness in an email means presenting only the current, pertinent information in short, simple sentences.
- b. Correctness in facts and details as well as spelling and grammar make the message easy to understand and follow.
- c. Completeness should be verified before clicking SEND. There is often a fine line between concise and complete.
- d. Courtesy is as important in an e-mail message as it is in any other type of document.

2. **Subject of the Message** should be descriptive to aid the reader; for safety reasons, some people do not open e-mails if they don't recognize the subject line.

3. **The Message** should include a salutation (formal or informal) and message.

### D. Business Reports

The primary purpose of a business report is to transmit data for decision-making purposes.

1. **Types of Business Reports** are determined by a variety of things.

- a. Textual material is presented in narrative reports; numeric information in statistical reports.
- b. Scheduled reports are sent at specific time intervals; special reports are prepared on demand.
- c. Information flow in the form of a report sent to someone at a higher level in the organization is referred to as a vertical report, a horizontal report is sent to those on the same level, and external reports are sent outside the organization.

- d. The context of the information determines the type of report. Nontechnical reports are sent to those without a background in the particular subject area; technical reports go to those in the field.
- e. The function of the final report can determine its type. Informational reports present facts; analytical reports present the facts and an interpretation of them.
- f. Message style is determined by the way information is presented; it may be chronological, logical, or psychological.

**2. Planning, Designing, and Conducting Research** is an important step in writing a report.

- a. Definition of the problem (research to find a preferred solution), trend (examines a topic over a span of time), or issue (should be examined in terms of different points of view) includes a number of steps.
  - Determine specific research questions
  - Define at least three subproblems to become themes of the study
  - Perform preliminary research to gain background information
  - Set limitations for the study; narrow the topic
  - Set the scope of the study and what will not be studied
  - Identify the independent variables, dependent variables, and other factors
- b. Collecting data can come from secondary sources (what others have written) and primary sources (conducted through experiments, observation, and surveys). Data collection methods must be carefully planned and monitored. Question formats should be selected to make data analysis easy – closed, open, or scaled. *The text presents a lot of detail in this area; review the information about questions.*
- c. Analyzing data includes evaluating and interpreting the data. It must first be organized for further analysis. Then it can be evaluated and interpreted relative to the problem that was defined.
- d. Reporting findings and drawing conclusions follows the data presentation. The narrative sequence includes a presentation and explanation of the data within paragraphs, followed by a table presenting the supporting statistics. A complete set of findings and conclusions is presented in a summary section of the report.
- e. Organizing the report depends on how well organized the plan is. Determinations must be made regarding the sequence of the report and the writing approach, and an outline should be created for each section.
- f. Writing the report also includes preliminary documents (letter of transmittal, title page, authorization form, table of contents, table of figures, abstract, executive summary), the body of the report (introduction, data analysis and findings, and conclusions), and supplementary parts (bibliography, works cited, glossary, appendices, and index).

### **Additional Resources for Students**

Recommended readings (no texts should be more than two years old):

- Boone, Louis E. and David L. Kurtz. *Contemporary Business Communication*. Prentice-Hall, Inc.
- Bovee, Courtland L. and John V. Thill. *Business Communication Today*. McGraw-Hill, Inc.
- Guffey, Mary Ellen. *Business and Administrations Communication*. South-Western Publishing Co.
- Himstreet, William C. and Wayne M. Baty. *Business Communication*. Kent Publishing Co.
- Lesikar, Raymond V. *Basic Business Communication*.
- Ober, Poland, Rosetti, Hanson, and Johnson. *Gregg College Document Processing*. Glencoe.
- Ober, Scott. *Contemporary Business Communication*.
- Wolf, P. and S. Kuiper. *Effective Communication in Business*.

Current issues of periodicals or business publications are also an excellent resource. Some of the following periodicals have an accompanying Web site.

<b><i>Current Periodical</i></b>	<b><i>Web Address</i></b>
<i>Gregg Reference Manual</i>	
<i>IAAP Complete Office Handbook</i>	<a href="http://www.iaap-hq.org/products/handbook.htm">http://www.iaap-hq.org/products/handbook.htm</a>
<i>Modern Office Technology</i>	
<i>OfficePro</i>	<a href="http://www.iaap-hq.org/officepro/toc.htm">http://www.iaap-hq.org/officepro/toc.htm</a>
<i>The Office</i>	