Cheat Sheet TBW

Created	@September 28, 2023 9:18 AM
Tags	Cheat Sheet Technical and Business Writing

▼ Chap 1

Features	Purpose	Writer's Knowledge of Topic	Audience	Criteria of Evaluation	Graphic Elements
Academic Writing	Communicating what the student knows about the topic to earn a high grade	Less than the teacher who evaluates the writing	The teacher who assigned the project or classmates	Depth, logic, clarity, unity, supporting evidence, and grammar	Sometimes used to explain and persuade
Workplace Writing	Getting something done within an organization	Usually more than the reader's knowledge	Often several people with differing professional backgrounds	Clear content organization, appropriate to the needs of busy readers	Frequently used to help readers find information and understand ideas

Features of Technical Writing

1. Contextualized (context based/ situation oriented)
2. Purposeful (objective)
3. Directional (specific audience)
4. Realistic (factual and verifiable)
5. Outcome-based (achieves targets)
6. Interdisciplinary (multiple fields)

An Effective Technical Document

ENERGY STAR

Use a Programmable Thermostat Properly

A programmable thermostat is ideal for people who are away from home during set periods of time throughout the week. Through proper use of pre-programmed settings, a programmable thermostat can save you about $180 every year in energy costs.

← Overview information summarizes the document's main point

How Do You Choose the Right One for You?

← Heading is phrased as the main question readers will ask

To decide which model is best for you, think about your schedule and how often you are away from home for regular periods of time—work, school, other activities—and then decide which of the three different models best fits your schedule:

7-day models are best if your daily schedule tends to change; for example, if children are at home earlier on some days. These models give you the most flexibility and let you set different programs for different days—usually with four possible temperature periods per day.

← Paragraphs and sentences are short

5+2-day models use the same schedule every weekday, and another for weekends.

← Color is used to highlight key items

5-1-1 models are best if you tend to keep one schedule Monday through Friday and another schedule on Saturdays and Sundays.

Programmable Thermostat Settings

You can use the table below as a starting point for setting energy-saving temperatures, and then adjust the settings to fit your family's schedule and stay comfortable.

Setting	Time	Setpoint Temperature (Heat)	Setpoint Temperature (Cool)
Wake	6:00 a.m.	< 70° F	> 78° F
Day	8:00 a.m.	Setback at least 8° F	Setup at least 7° F
Evening	6:00 p.m.	< 70° F	> 78° F
Sleep	10:00 p.m.	Setback at least 8° F	Setup at least 4° F

← Table provides easy-to-read comparative data

Q1. Am I writing primarily to create a record or provide information, to request or to persuade?

Purpose of Technical Writing

People in the working world communicate technical information for a number of purposes, many of which fall into one of two categories:

- To help others learn about a subject, carry out a task, or make a decision.
- To reinforce or change attitudes and motivate readers to take action.

TW is done by an informed writer conveying needed information to an uninformed reader.

Q2. Who will read what I have written?

✓ Supervisors and their Superiors
✓ Colleagues in your own department
✓ Subordinates in your department
✓ Employees and other departments or branches
✓ Clients
✓ Subcontractors and vendors
✓ Professors/ Members of selection committees
✓ HR Manager

Audience of Technical Writing

TECHNICAL DOCUMENTS

Correspondence
Memos to your boss and to your Routine letters to customers, vendors etc Letters to customers Sales letters to potential customers Electronic mail to co-workers or customers
Short Reports
Analysis of problem Recommendation Equipment Evaluation Progress or periodic report Description of results of a laboratory work or a company trip
Long Reports
Project report in field or laboratory work Proposal and Feasibility study
Other Examples
Abstract or summary of technical articles Technical article or presentation Operation manual Website

Tone in Technical Writing

Tone refers to the writer's attitude/ emotional character towards the reader and the subject of the message.

Factual	Usually serious to a lighter tone
Neutral	Appropriate to the target audience
Sincere	Avoids a strong emotion
Non-discriminative	

Tone in Technical Writing

- Polite tone (especially those who outrank you)
- Don't sound too tough or demanding about potentially sensitive issues.
- Phrase your sentences in a nonthreatening way
- Emphasize the reader's viewpoint – the **"you" approach**

Writer-centered Perspective	Reader-centered Perspective
If I can answer any questions, I'll be happy to do so.	If you have any questions, please ask.
We shipped the order this morning	Your order was shipped this morning.
I'm happy to report that . . .	You'll be glad to know that . . .

- **Negative Wording**
  - We cannot process your claim because the necessary forms have not been completed
  - We do not take phone call after 3:00 PM on Fridays
  - We closed your case because we never received the information requested in our letter of April 2.

- **Positive Wording**
  - Your claim can be processed as soon as you complete the necessary forms.
  - You may reach us by telephone on Fridays until 3 PM.
  - Your case will be reactivated as soon as you provide the information requested in out April 2 letter.

Positive Language

What are the possible alternatives of "no problem" to make your readers feel positive?

- You are welcome/You're welcome.
- It was my pleasure/My pleasure.
- We're here to help!
- Thank you!
- Thanks for asking about our ...
- Thanks for the question, which helped me update our instructions.
- I'm glad to hear I helped.
- Thanks for letting me know I was helpful.
- Nice to know I helped.
- We appreciate your business.
- We appreciate your business, and I'm here to help.

October 13, 2013

Mr. Philip Updike
246 Alton St.
Atlanta, GA 30300

Dear Mr. Updike:

lording is
o explicit

We are sorry that you found a piece of glass in your Superior microwave dinner. Please accept our assurances that this is a very unusual incident.

Here are three coupons redeemable at your local grocery store for complimentary Superior dinners of your choice.

sitive tone
spite negative
tuation

We hope you will continue to enjoy our fine products.

Sincerely,

John Roth

John Roth
Customer Services Dept.

Enclosures (3)

A suggested revision of letter's opening paragraph:

Thank you for purchasing our product and for taking time to contact us about it. We apologize for the unsatisfactory condition of your Superior microwave dinner.

Ethics Guidelines at Work

- Be honest
- Do no harm
- Be fair
- Honor intellectual property rights
- Respect confidentiality
- Be professional

"our product is just what you need"

"our artificial sweetener is composed of proteins that occur naturally in the human body [amino acids]."

"our Krunchy Cookies contain no cholesterol"

Such claims are technically accurate but misleading.

Amino acids in certain sweeteners can alter body chemistry and cause headaches, seizures and possible brain tumors

Processed food snacks often contain saturated fat and trans fats, from which liver produces cholesterol

In addition to being informative and persuasive, communicators must be ethical.

	Meaning	*Examples*
Suppression of Information	Burying to data to hide inconvenient truths	A company fails to reveal product-testing results that indicate potential danger to consumers
Falsification or fabrication	Changing or inventing data to support a desired outcome	A company boasts of a fictitious enterprise to lure investors into supporting a new venture
Overstatement or understatement	Exaggerating the positive aspects of a situation of downplaying negative aspects to create the desired impression	A public-opinion survey describes 55 percent of the respondents as a "substantial majority" and 45 percent as "a small percentage"
Selective misquoting	Deleting words from quoted material to distort meaning	A supervisor changes a report's conclusion that "this proposal will seem feasible only to workers unfamiliar with the situation" to "this proposal will seem feasible.. to workers"
Subjective Wording	Using terms deliberately chosen for their ambiguity	A company advertises "customary service charges", knowing that "customary" is open to broad interpretation.
Conflict of interest	Exploiting behind-the-scenes connections to influence decision-making	A board member of a community agency encourages the agency to hire her company for paid services rather than soliciting bids
Withholding information	Refusing to share relevant data with coworkers	A computer-savvy employee provides misleading answers about new software to make recently hired coworker appear incompetent
Plagiarism	Taking credit for someone else's ideas, findings	An employee assigned to prepare a report written by someone at another company, downloaded from internet

Culture and its Impact on Communication

"Our accumulated knowledge and experiences, beliefs and values, attitudes and roles – in other words, our cultures – shape us as individuals and differentiate us as people… Most important for communicators, our cultures manifest themselves in our information needs and our styles of communication… our expectations as to how information should be organized, what should be included in its content, and how it should be expressed."

(Culture and Communication, Robert G. Hein)

An effective communication style in one culture may be offensive elsewhere.

For **example**, a survey of top international executives reveals the following attitudes towards U.S. communication style (Wandycz):

Latin America"	"Americans are too straightforward, too direct.."
East Europe	"An imperial tone… it's always about how [Americans] know best."
Southeast Asia	"To get my respect, American business [people] should know something about [our culture]. But they don't."
Western Europe	"Americans miss the small points."
Central Europe	"Americans tend to oversell themselves."

▼ Chap 6

- **Letter :** A document that conveys information to a member of one organization from someone outside that same organization. Letters usually cover one major point and fit on one page.
- **Memo:** A document written from a member of an organization to one or more members of the same organization. Memos usually cover just one main point and no more than a few.
- **E-mail:** A document often written in an informal style either to members of one's own organization or to an external audience.
- **Correspondence Guidelines**

  The purpose sentence often becomes one of the first sentences in the document.

  1. **Know Your Purpose**

     Memo purpose sentence: "This memo explains M-Global's new policy for selecting rental cars on business trips."

     Letter purpose sentence: "As you requested yesterday, I am sending samples of the new candy brands you are considering placing in M-Global's office vending machines."

     E-mail purpose sentence: "I have attached the most recent draft of the proposal for the PI Corp. pipeline project."

  2. **Know Your Readers**

  3. **Follow Correct Format**

     Letters: There are three main letter formats—block, modified block, and simplified.

     Memos: With minor variations, all memos look much the same. The obligatory "Date/To/From/Subject" information hangs at the top left margin.

     E-mail: Computers and e-mail systems handle formatting of texts and special characters differently, so you should format your email so that it can be read on any computer.

  4. **Follow ABC Format**

     Abstract: The abstract introduces the purpose and usually gives a summary of main points to follow.

     Body: The body contains supporting details and thus makes up the largest part of a letter or memo.

     Conclusion: Readers remember first what they read last. The final paragraph of your correspondence should leave the reader with an important piece of information—for example, a summary of the main idea or a clear statement of what will happen next.

5. **Follow the 3 Cs Strategy**

   Capture the reader’s attention with a good opener, which tells the reader what the letter, memo, or e-mail can do for him or her.

   Convince the reader with supporting points, all of which confirm the opening point that this document will help the reader meet his or her goals.

   Contact solidifies your relationship with the reader with an offer to follow up on the correspondence.

6. **Use Attachment for Details**

7. **Be Diplomatic**

   Choose words that persuade, not demand.

8. **Edit Carefully**

   - **Mechanics**
   - Misspelled words of any kind, but especially the reader’s name
   - Wrong job title (call the reader’s office to double-check, if necessary)
   - Old address (again, call the reader’s office to check)
   - **Grammar**
   - Subject-verb and pronoun agreement errors
   - Misused commas
   - **Style**
   - Stuffy phrases, such as “Per your request” and “Enclosed herewith”
   - Long sentences with more than one main and one dependent clause

- if we rephrase
  - Know your purpose
  - Know your readers
  - Follow correct format
  - Follow the ABC format for all correspondence
  - Use the 3Cs strategy
  - Stress the “you” attitude
  - Use attachments for details
  - Be diplomatic
  - Edit carefully
  - Respond quickly

- Types of messages in Correspondence
  - Correspondence with a positive message
    - All positive messages follow one overriding rule. You must always: State good news immediately!

ABC Format:
Positive Correspondence

- **ABSTRACT:** Puts correspondence in the context of an ongoing professional relationship by referring to previous communication related to the subject
  - Clear statement of good news you have to report
- **BODY:** Supporting data for main point mentioned in abstract
  - Clarification of any questions reader may have
  - Qualification, if any, of the good news
- **CONCLUSION:** Statement of eagerness to continue relationship, complete project, etc.
  - Clear statement, if appropriate, of what step should come next

- Correspondence with a negative message
  - One main rule applies to all negative correspondence: Buffer the bad news, but still be clear.

ABC Format:
Negative Correspondence

- **ABSTRACT:** Puts correspondence in the context of an ongoing professional relationship by referring to previous communication related to the subject
  - General statement of purpose or appreciation—in an effort to find common bond or area of agreement
- **BODY:** Strong emphasis on what can be done, when possible
  - Buffered yet clear statement of what cannot be done, with clear statement of reasons for negative news
  - Facts that support your views
- **CONCLUSION:** Closing remarks that express interest in continued association
  - Statement, if appropriate, of what will happen next

- Correspondence with a neutral message
  - the reader usually has no personal stake in the news, However, always abide by this main rule
  - Make your message absolutely clear.

ABC Format:
Neutral Correspondence

- **ABSTRACT** Puts correspondence in the context of an ongoing professional relationship by referring to previous communication related to the subject
  - Precise purpose of correspondence (e.g., request, invitation, information about new procedure)
- **BODY:** Details that support the purpose statement (e.g., a description of items requested, the requirements related to the invitation, a description of changes in procedure)
- **CONCLUSION:** Statement of appreciation
  - Description of actions that should occur next

- Correspondence with a persuasive message
  - The one main rule that governs all persuasive correspondence is as follows: Help readers solve their problems.

ABC Format:
Persuasive Correspondence

- **ABSTRACT:** Puts correspondence in the context of an ongoing professional relationship by referring to previous communication related to the subject. Identifies problem or issue to be addressed
  - Focuses on how the information in the correspondence will help the reader
- **BODY:** Puts strongest points first or last, to emphasize them for the reader.
  - Clear explanation of steps to be taken
  - Emphasis on benefit to the reader
  - Reference to any attachments
- **CONCLUSION:** Summary of actions requested, with emphasis on the benefit to the reader
  - Statement of what will happen next
  - Offer of further explanation or future contact

Business Letters Types

- Invitations
- Instructions
- Answer to inquiry
- Complaint
- Adjustment
- Reference
- Advice
- Introducing new business
- Amalgamation of business
- Acknowledgement

POSITIVE
NEGATIVE
NEUTRAL
PERSUASIVE

Parts of a Letter

1. Letterhead of your Organization
2. Date
3. Inside Address
4. Subject Line
5. Salutation
6. Body
7. Complimentary Closing
8. Writer's Signature Block
9. Your full name (typed)
10. End Notations CC

Heading or Letterhead

- Place your **full return address** and the **date** in the heading (if no letterhead).
- Avoid writing **name** (your name appears at the end of the letter)
- **Spell out** words such as street, avenue, first, and west rather than abbreviating them.
- The **date** usually goes directly beneath the last line of the return address. Avoid abbreviating the name of the month.
- Begin the **heading** about two inches from the top of the page.
- If you are using **letterhead** that gives the company address, enter only the date, below the last line of the letterhead.

Inside Address

- the recipient's full name
- Title/designation
- address in the inside address,
- One line below the date, depending on the length of the letter

Subject Line

- An optional element in a letter is a subject line.
- It follows the recipient's address
- Insert one blank line above and one blank line below the subject line.
- The subject line in a letter functions as an aid in focusing the topic and filing the letter.
- Subject lines are especially useful if you are writing to a large company and do not know the name or title of the recipient. In such cases, you may address a letter to an appropriate department or identify the subject in a subject line and use no salutation.

Salutation

- In most business letters, the salutation contains the recipient's personal title (such as Mr., Ms., Dr.) and last name, followed by a colon (:).
- If you are on a first-name basis with the recipient, use only the first name in the salutation.
- Address women as Ms. unless they have expressed a preference for Miss or Mrs.
- Professional titles (such as Professor, Senator, Major) take precedence over Ms. and similar courtesy titles.
- When a person's first name could refer to either a woman or a man, one solution is to use both the first and last names in the salutation.

Salutation

- Avoid "To Whom It May Concern" because it is impersonal and dated.
- Dear Professor Ali and Dr. Alishba: [two recipients], Dear Ms. Asma, Ms. Aleena, and Mr. Asim: [three recipients], Dear Colleagues: [Members, or other suitable collective term].
- In other circumstances in which you do not know the recipient's name, use a title appropriate to the context of the letter, such as Dear Customer or Dear IT Professional.
- Dear Sir/Madam

Body

- The body of the letter should begin a line below the salutation
- Leave a line within paragraphs
- To provide a fuller appearance to a very short letter, you can increase the side margins, increase the font size and insert extra space above the inside address, the writer's signature block, and the initials of the person typing the letter..
- Components of Body:
  1. Purpose
  2. Details
  3. Call for Action
  4. Closing off

Complimentary Closing

- Type the complimentary closing a space below the body.
- Use a standard expression such as Sincerely, Yours sincerely or Yours truly.
- If the recipient is a friend as well as a business associate, you can use a less-formal closing such as Best wishes or Best regards or, simply, Best.
- Capitalize only the initial letter of the first word, and follow the expression with a comma (,).

Writer's Signature Block

- Type your full name four lines below and aligned with the complimentary closing.
- Sign the letter in the space between the complimentary closing and your name.
- On the next line include your business title, if appropriate.
- The following lines may contain individual contact information, such as a telephone number or an e-mail address, if not included in the letterhead or the body of your letter.

End Notations

- **Reference initials** show the letter writer's initials in capital letters, followed by a slash mark (or colon), and then the initials of the person typing the letter in lowercase letters (When the writer is also the person typing the letter, no initials are needed).
- **Enclosure notations** indicate that the writer is sending material along with the letter (an invoice, an article, and so on).
- Enclosure notations may take several forms: Enclosure: Final Safety Report
- **Copy notation** ("cc:") tells the reader that a copy of the letter is being sent to the named recipient(s).
- Use a **blind-copy notation** ("bcc:") when you do not want the addressee to know that a copy is being sent to someone else. A blind-copy notation appears only on the copy, not on the original ("bcc: Dr. Ali Afzal").

Continuing Pages

- If a letter requires a second page (or, in rare cases, more), always carry at least two lines of the body text over to that page.
- Use plain (non-letterhead) paper of quality equivalent to that of the letterhead stationery for the second page.
- It should have a header with the recipient's name, the page number, and the date. Place the header in the upper left-hand corner or across the page.

- types of letters

1. Acknowledgement Letter

- When a client sends you something or makes a request, you should acknowledge what was sent, respond to the request, or explain that you cannot respond to the request immediately in a short, polite note.
- A letter of acknowledgement is both a receipt and a public relations tool
- Its objective is to let the reader know that items requested in a prior communication, usually an inquiry or an order letter, have been received.
- To complete a business communication cycle.
- Should be written on the same day

2. Complaint Letter

- A complaint letter advises the reader of an error in a business transaction or a defect discovered in a consumer product or service.
- The objective is to provide detailed information regarding the error or defect and to serve as a legal document recording the writer's claim and the corrective action or adjustment being requested.
- Keep in mind that your reader is a trained customer service professional and not very likely to be the person responsible for the error or defect.
- Rather than being angry, use a firm but courteous tone when stating a complaint. Remember, you want results, not a fight.
- The scope of a complaint letter should include only those facts that validate your claim and a request that corrective steps be taken.
- It may also detail the options that you are willing to accept in satisfaction of the claim.

Complaint Letter

- Describes a problem that the writer requests the recipient to solve.
- The tone of a complaint letter or email is important; the most effective ones do not sound complaining.
- If your message is harsh and argumentative you may not be taken seriously.
- Assume that the recipient will be reliable in correcting the problem. However, anticipate reader reactions or refutations
- I reviewed my user manual's "safe operating guidelines" carefully before I installed the device. [This assures readers you followed instructions.]
- Without such explanations, readers may be tempted to dismiss your complaint.

288-Sector F11,
Islamabad
August 28, 2018

Customer Support
Social Square Private Limited
Phase III Defense Housing Authority,
Lahore
Dear Customer Support:

Subject: Diagnostic Scanners Delivery

I am writing this letter to bring the issue of wrong items delivery under your consideration.
On July 11, I ordered nine Diagnostic Scanners (order # ST3-1179R). The scanners were ordered from your customer Web portal. On August 3, I received seven Monitors from your parts warehouse in Islamabad, Pakistan. I immediately returned those Monitors with a note indicating that a mistake had been made. However, not only have I failed to receive the Scanners that I actually ordered, but I have also been billed for the seven Monitors.
I have enclosed a copy of my confirmation e-mail, the shipping form, and the most recent bill. If you cannot send me the Scanners I ordered by September 15, please cancel my order.
Sincerely,
Aqib Tahir

Enclosure: Confirmation e-mail, Shipping Form, Most Recent Bill

3. Adjustment Letter

- An adjustment letter or e-mail is written in response to a complaint and tells a customer or client what your organization intends to do about the complaint.
- Although sent in response to a problem, an adjustment letter actually provides an excellent opportunity to build goodwill for your organization.
- An effective adjustment letter can not only repair any damage done but also restore the customer's confidence in your company.
- No matter how unreasonable the complaint, the tone of your response should be positive and respectful.
- Avoid emphasizing the problem, but do take responsibility for it when appropriate.
- Focus your response on what you are doing to correct the problem.
- Settle such matters quickly and courteously, and lean toward giving the customer or client the benefit of the doubt at a reasonable cost to your organization.

Example: Full Adjustment (When company is at fault)

Dear Mr. Basit:

We are sorry that your experience with our customer support helpline did not go smoothly. We are eager to restore your confidence in our ability to provide dependable, high-quality service. Your next three months of Internet access will be complimentary as our sincere apology for your unpleasant experience.

Providing dependable service is what is expected of us, and when our staff doesn't provide quality service, it is easy to understand our customers' disappointment. I truly wish we had performed better in our guidance for setup and log-on procedures and that your experience had been a positive one. To prevent similar problems in the future, we plan to use your letter in training sessions with customer support personnel.

We appreciate your taking the time to write us. It helps to receive comments such as yours, and we conscientiously follow through to be sure that proper procedures are being met.

We believe you will enjoy best of our services.

Example: Partial Adjustment (When company is at fault)
Dear Mr. Saim:
Enclosed is your Hair Laptop Computer, which you shipped to us on August 31.
Our technical staff reports that the laptop was damaged by exposure to high levels of humidity. You stated in your letter that you often use your laptop on a covered courtyard. Doing so in a high-humidity environment, as is typical in Islamabad, can result in damage to the internal circuitry of your computer as described on page 32 of your Hair Owner's Manual.
We have replaced the damaged circuitry and thoroughly tested your laptop. To avoid similar problems, we recommend you avoid leaving your laptop exposed to high humidity for extended periods.
If you find that the problem recurs, please call us at 000-000-0000. We will be glad to work with you to find a solution.

- Emails

E-Mails
- Specific email guidelines are added to the general guidelines for correspondence earlier in the chapter.
E-mail Guidelines
Use style appropriate to the reader and subject
Be sure your message indicates the context to which it applies
Choose the most appropriate method for replying to a message
Format your message carefully
Chunk information for easy scanning
Use Copy options carefully
When writing to groups, give readers a method to abstain from receiving future notices
When writing to groups, suppress the e-mail addresses of recipients
When composing an important message, consider composing it with your word processor

Email Guideline 1: Use Style Appropriate to the Reader and Subject
Written more like a letter, with a salutation, closing, and complete sentences.
Use casual style when on better terms
Do not display an angry or negative tone
Email Guideline 2: Be Sure Your Message Indicates the Context to Which It Applies
mention subject
when replying include reply text and subject (re:) discreetly

Email Guideline 1: Use Style Appropriate to the Reader and Subject
Written more like a letter, with a salutation, closing, and complete sentences.
Use casual style when on better terms
Do not display an angry or negative tone
Email Guideline 2: Be Sure Your Message Indicates the Context to Which It Applies
mention subject
when replying include reply text and subject (re:) discreetly

Email Guideline 3: Choose the Most Appropriate Method for Replying to a Message

- Short messages
  - affirmative
  - understood etc.
- Long messages
  - divide reply into multiple topics
  - discuss each individually

Email Guideline 4: Format Your Message Carefully

Practice organizing messages into:

- headings
  - chunks of info - (guideline 5)
- Lists
  - series of info
- white spaces (blanks)
  - separation of info
- divide one piece from another (seperation)

An example of headings and unsubscribe

Figure 7–2 Long email message with use of appropriate headings, separators, and white space

****
X-Sender: mckinley@mail2.mcduff.com
Date: Tue, 10 Oct. 2002 09:25:30 -0800
To: Branch employees
From: Paul Carmichael <pcarmich@advantage.com>
Subject: October update
Mime-Version: 1.0

This is the October Electronic Update for Advantage, Inc. If you do not wish to receive this electronic update, send a message to

pcarmich@advantage.com

With the message in the subject line: Unsubscribe.

****
UPCOMING EVENTS
****

Project managers' meeting

October 21—project managers meeting (notice the change of location): Hereford building, room 209.

****

November department meetings

All departments will have their planning and reporting meetings on November 18 at noon, with a joint lunch in the main dining room and breakout sessions at 12:30. Meetings should conclude at 2 p.m.

****

December department meetings

NOTE CHANGE OF DATE: The December department meetings will be held on December 9 (second Wednesday), NOT December 16 (third Wednesday).
****

Email Guideline 5: Chunk Information for Easy Scanning

Chunking for easiness of reader

****
X-Sender: mckinley@mail2.m-global.com
Date: Tue, 11 Nov 2012 09:25:30 -0800
To: pcarmich@advantage.com
From: Mike McKinley <mckinley@mail2.m-global.com>
Subject: our recent visit
Mime-Version: 1.0

Dear Paul,

YOU WROTE:

>I hope that you had a good flight back home. I certainly enjoyed meeting you and look forward to the possibility of working with you this coming spring on the project that your firm, M-Global, may do for us.

REPLY:

The trip back was fine, but tiring. I enjoyed meeting you also and visiting with your staff. I particularly enjoyed meeting Harold Black, for he will be very valuable in developing the plans for the possible water purification plant.

YOU WROTE:

>If Advantage, Inc., does decide to build the water purification plant, we would be very interested in having M-Global's Mary Stevens as the project manager.

REPLY:

That certainly will be a possibility; Mary is one of our best managers.

YOU WROTE:

>After you left, I called the city administration here in Murrayville. M-Global does not need a business license for your work here, but, of course, you will need the necessary construction permits.

E-mail Guideline 6: Use Copy Options Carefully

Be careful before sending multiple copies of same mail, pay heed to :

The "To:" line indicates a primary audience of participants

The "Cc:" line indicates a secondary audience of lesser importance.

Finally, use the "Bc:" line very carefully, preferably to mail to self.

E-mail Guideline 7: When Writing to Groups, Give Readers a Method to Abstain from Receiving Future Notices

Allow reader to decide which email he wants to see, we have already seen this example.

E-mail Guideline 8: When Writing to Groups, Suppress the E-mail Addresses of Recipients—Unless the Group Has Agreed to Let Addresses Be Known
Use Bcc for hiding addresses of people receiving emails, it is inappropriate to leave them open.
E-mail Guideline 9: When Composing an Important Message, Consider Composing It With Your Word Processor
Compose important and sensitive emails with your word processor, which has its spellchecker, this saves you the trouble of grammatical errors.

Appropriate use of style for email:
Speedily arrives the recipient
Arrival can be confirmed easily
Recipient can reply quickly
Cheap to use and cheap to transmit multiple instances of messages and attachments
Next slide will explain this

ABCs for email
ABC Format:
E-mail
ABSTRACT: Casual, friendly greeting if justified by relationship
Short, clear statement of purpose for writing
List of main topics to be covered
BODY: Supporting information for points mentioned in abstract
Use of short paragraphs that start with main ideas
Use of headings and lists
Use of abbreviations and jargon only when understood by all readers
CONCLUSION: Summary of main point
Clarity about action that comes next
DATE: September 15, 2012
TO: Natalie Long
FROM: Josh Bergan
SUBJECT: Zanger Dam Project
Natalie—
I've got an idea that might save us A LOT of time on the Zanger Dam project. Check out the company project sheet on the Russian nuclear plant job done last year.
Operators of hi-tech dams and nuke plants seem to face the same hassles:
• confusing displays
• need to respond quickly
• distractions
When either a dam or nuke operator makes a mistake, there's often big trouble. I think we'd save time—and our client's money—if we could go right to some of the technical experts used in the nuke job. At least as a starting place. Maybe we'd even make our deadline on this project. That would be a change, considering the schedule delays this month on other jobs.
What do you think about this idea? Let me know today, if possible.

- MEMOs

Memos should contain the following key components:
Memo ID
Introduction
Discussion
Conclusion
DATE:
TO:
FROM:
SUBJECT: Focus + Topic
Introduction: A lead-in, warm up, overview, stating why you are writing and what you are writing about
Discussion: Detailed development, made accessible through highlighting techniques, explaining exactly what you want to say
Conclusion: A summation stating what is next, when this will occur, and why the date is important

Examples

One-word **subject** lines don't communicate effectively, e.g.
Flawed: Subject: COMPTROLLERS
Corrected: *Subject:* Salary Increase For Comptrollers

Introduction - example

1. In the third of our series of quality control meetings this quarter, I'd like to get together again to determine if improvements have been made.
2. As a follow-up to our phone conversation yesterday (8/12/05). I have met with your VP regarding your suggestions, He'd like to meet with you to discuss the following ideas in more detail.

Examples

Conclusion

A complimentary close: If our quarterly sales continue to improve at this rate, we will double our sales expectations by 2005. Congratulation!

A directive close: Next Wednesday (12/22/05), Mr. Jones will provide each of you a timetable of events and a summary of accomplishments.

MEMO

DATE: January 19, 2005
TO: Tom Lisk
FROM: Juliet Kincaid
SUBJECT: PRODUCING THE ANNOY-NO-MORE CALL SCREENING MACHINE.

Subject line should not end with periods

Our product development staff has come up with a breakthrough new product, a phone answering machine that answers the phone, screens calls, and, by voice activation, routes the call to an appropriate message and gives a busy signal when the person doesn't want to be bothered.

Good technical writing should be concise—this sentence is too long

We have researched this product fully and believe it would benefit our company because:

Grammatically, this colon is used incorrectly

1. The product has a relatively simple design that occupies no more space than a regular phone and can be designed for wall or desk mounting.
2. The cost for manufacturing is low compared to the retail value. The unit costs approximately $100.00 to produce and retails for $999.99.
3. The unit can be interchanged easily with all phone networks including MBB and Shout.

"around" is vague word usage

We would like to begin mass production around April 1, 2005. Our Westport facility could handle the production with the addition of 10 technicians and engineers to aid in production. We hope you give this product consideration and endorse it fully. Thanks.

- Difference

Letter vs Memo

Letter	Memo
• Letters are used both external communication (mostly) • A letter requires inside address, Salutation and complimentary close. • Communicating to external people through letter, simple words are encouraged rather than jargons.	• A memo is used internally within an organization moving upward, downward or horizontally. It is never sent outside. • A memo may omit return address, salutation, complimentary close if it uses To, from, Date and Subject heading. • Memo can use technical jargons and abbreviations because their meaning is understood by the people within the organization.

▼ Chap 9

Primary Data: Data collected by the researcher through interviews, focus groups, surveys, laboratory experiments, or field observations. Primary sources also include original works such as diaries, company reports, and correspondence, as well as documents that are the subject of analysis, such as user’s manuals and Web sites.

Surveys are often a combination of quantitative and qualitative research methods because they can present numerical data about people’s opinions

Quantitative research is judged by validity and reliability.

- Research is valid if it measures what it was designed to measure.
- Research is reliable if it can be repeated with the same results.

Qualitative research cannot be represented in numbers. Instead, qualitative research analyzes words, images, processes, or objects. In particular, technical communicators use the following methods to collect qualitative data:

- Interviews
- focus groups
  - small groups of employees or clients—to learn about issues related to the design of products, Web sites, or documentation. Preparing to work with focus groups is much like preparing for interviews, although you will be recording discussion and interaction among the group members.
- Field observations
  - watch clients use equipment or software on-site, so that they can learn more about who their readers are and how their readers use equipment, software interfaces, or documentation.
- Document analysis

Qualitative research is judged by credibility, transferability, and dependability.

- Research is credible if the people interviewed or the processes or examples analyzed are typical of the people, processes, or examples being studied.
- Research is transferable if the findings can be applied to similar settings or objects.
- Research is dependable if different researchers would probably reach similar conclusions

Criteria

- interview
  - Develop a list of specific objectives for the interview
  - Make clear your main objectives when you make contact for the interview
  - Prepare an interview outline.
  - Show that you value your interviewee’s time.
  - Ask mostly open-ended questions.
  - Ask close-ended questions when you need to nail down an answer.

    - Use summaries throughout the interview
- Surveys
    - Write a precise purpose statement.
    - Limit the number of questions.
    - Ask mostly objective questions.
        - either/or questions
        - multiple choice ques
        - graded scale ques
        - short answers ques
    - Provide clear questions that are easy to answer
    - Include precise and concise instructions at the top of the form
    - Apply principles of document design
    - Test the survey on a sample audience.
    - Choose an appropriate audience
    - Introduce the survey with a clear and concise cover letter.
        - Opening paragraph: State precisely the purpose of the survey and perhaps indicate
          why this reader was selected.
        - Middle paragraph(s): State the importance of the project and strive to emphasize
          ways that it may benefit the reader.
        - Concluding paragraph: Specify when the survey should be returned, even though this information will be included in the directions on the survey itself.
    - Encourage a quick response

▼ Chap 10

Informal Documents

Definition:

A somewhat short document, usually no longer than five pages of text, not including attachments. It has more substance than a simple letter or memo but is presented in letter or memo format. It can be directed to readers either outside or inside your organization. If outside, it may be called a letter report or letter proposal. if inside, it may be called a memo report or memo proposal

Characteristics

- Informal documents have a narrower focus, on a specific problem, situation, or event.
- Informal documents may be written by a team, but they are often written by a single author.
- Informal documents usually have few readers, or even just one reader.
- Informal documents are usually two to five pages long.
- Informal documents use letter (for external audiences) or memo (for internal audiences) format.
- Informal documents may be created in a preset form or a template.
- Informal documents use headings to help readers find information.
- Informal documents may include appendixes.

Guideline 1: Plan Well Before You Write

Before you begin writing a draft, use the Planning Form to record specific information about these points:

- The document's purpose
- The variety of readers who will receive the document
- The needs and expectations of readers, particularly decision makers
- An outline of the main points to be covered in the body
- Strategies for writing an effective document

Guideline 2: Use Letter or Memo Format

Letter reports and proposals follow about the same format as typical business letters. Yet the format of letter reports and proposals differs from that of letters in the following respects:

- The greeting is sometimes left out or replaced by an attention line, especially when your letter report or proposal will go to many readers in an organization.
- A title often comes immediately after the inside address. It identifies the specific project covered in the document. You may have to use several lines because the project title should be described fully, in the same words that the reader would use.
- Spacing between lines might be single, one-and-one-half, or double, depending on the reader's preference.

Guideline 3: Make Text Visually Appealing

Your informal report or proposal must compete with other documents for each reader's attention. Following are three visual devices that help get attention, maintain interest, and highlight important information:

- Bulleted points for short lists (like this one)
- Numbered points for lists that are longer or that include a list of ordered steps
- Frequent use of headings and subheadings

Guideline 5: *Create the Abstract as an Introductory Summary*

This section give readers three essential pieces of information:

1. Purpose for the document—Why are you writing it?

2. Scope statement—What range of information does the document contain?

3. Summary of essentials—What main information does the reader most want or need to know?

Guideline 6: *Put Important Details in the Body*

Following are three main suggestions for organization:

1. Use headings generously.
2. Precede subheadings with a lead-in passage.
3. Move from general to specific in paragraphs.

Another important consideration in organizing the document discussion is the way you handle facts versus opinions

Guideline 7: *Separate Fact From Opinion*

The safest approach in the document organization is to move logically from findings to your conclusions and, finally, to your recommendations.

1. *Findings*: Facts you uncover (e.g., you observed severe cracks in the foundations of two adjacent homes in a subdivision).
2. ***Conclusions***: Summary of the document that emphasizes the information most important to your readers. Opinion is clearly a part of conclusions.
3. ***Recommendations***: Suggestions or action items based on your conclusions. These are almost exclusively made up of opinions, but they should clearly be grounded in the facts presented in the document.

Guideline 8: ***Focus Attention in Your Conclusion***

This section gives details about your major findings, your conclusions. Choose the wording that best fits the content of your document.

The precise amount of detail in your conclusion depends on which of these two options you choose for your particular document:

Option 1: If your major conclusions or recommendations have already been stated in the discussion, then you only need to restate them briefly to reinforce their importance.

Option 2: If the discussion leads up to, but has not covered, these conclusions or recommendations, then you may want to give more detail in this final section.

Guideline 9: Use Attachments for Less Important Details

- Informal documents are by definition short, yet detailed technical information is often needed for support.
- One solution to this dilemma is to place technical details in clearly labeled attachments that could include

■ **Tables and figures:**

Illustrations in informal documents usually appear in attachments unless it is crucial to include one within the text. Informal documents are so short that attached illustrations are easily accessible.

■ **Costs:**

It is best to list costs on a separate sheet. First, you do not want to bury important financial information within paragraphs. Second, readers must often circulate cost information, and a separate cost attachment is easy to photocopy and send.

Guideline 10: Edit Carefully

Many readers judge you on how well you edit every document.

■ Keep most sentences short and simple.

■ Proofread several times for mechanical errors such as misspellings (particularly personal names).

■ Triple-check all cost figures for accuracy.

■ Make sure all attachments are included, are mentioned in the text, and are accurate.

■ Check the format and wording of all headings and subheadings.

■ Ask a colleague to check over the document.

Informal Report (Letter Format)

12 Post Street
Houston Texas 77000
(713) 555-9781

April 22, 2012

Big Muddy Oil Company Inc
12 Rankin St
Abilene TX 79224

ATTENTION: Mr. James Smith, Engineering Manager

Includes specific title.

SHARK PASS STUDY
BLOCK 15, AREA 43-B
GULF OF MEXICO

Uses optional heading for abstract part of ABC format.

INTRODUCTORY SUMMARY

You recently asked our firm to complete a preliminary soils investigation at an offshore rig site. This report presents the tentative results of our study, including major conclusions and recommendations. A longer, formal report will follow at the end of the project.

Draws attention to main point of report.

On the basis of what we have learned so far, it is our opinion that you can safely place an oil platform at the Shark Pass site. To limit the chance of a rig leg punching into the seafloor, however, we suggest you follow the recommendations in this report.

Gives on-site details of project—dates, location, tasks.

WORK AT THE PROJECT SITE

On April 15 and 16, 2012, M-Global's engineers and technicians worked at the Block 15 site in the Shark Pass region of the gulf. Using M-Global's leased drill ship, *Seeker II*, as a base of operations, our crew performed these main tasks:

- Seismic survey of the project study area
- Two soil borings of 40 feet each

Uses lead-in to subsections that follow.

Both seismic data and soil samples were brought to our Houston office the next day for laboratory analysis.

LABORATORY ANALYSIS

On April 17 and 18, our lab staff examined the soil samples, completed bearing capacity tests, and evaluated seismic data. Here are the results of that analysis.

Highlights most important point about soil layer—that is, the weak clay.

Soil Layers

Our initial evaluation of the soil samples reveals a 7- to 9-foot layer of weak clay starting a few feet below the seafloor. Other than that layer, the composition of the soils seems fairly typical of other sites nearby.

M-Global Inc | 127 Rainbow Lane | Baltimore MD 21202 | 410.555.8175

■ Model 10–1 ■ Informal report (letter format)

James Smith
April 22, 2012
Page 2

Bearing Capacity

We used the most reliable procedure available, the XYZ method, to determine the soil's bearing capacity (i.e., its ability to withstand the weight of a loaded oil rig). That method required that we apply the following formula:

Notes why this method was chosen (i.e., reliability).

$Q = cNv + tY$, where
Q = ultimate bearing capacity
c = average cohesive shear strength
Nv = the dimensionless bearing capacity factor
t = footing displacement
Y = weight of the soil unit

The final bearing capacity figure will be submitted in the final report, after we repeat the tests.

Seafloor Surface

By pulling our underwater seismometer back and forth across the project site, we developed a seismic "map" of the seafloor surface. That map seems typical of the flat floor expected in that area of the gulf. The only exception is the presence of what appears to be a small sunken boat. This wreck, however, is not in the immediate area of the proposed platform site.

Explains both how the mapping procedure was done and what results it produced.

CONCLUSIONS AND RECOMMENDATIONS

Based on our analysis, we conclude that there is only a slight risk of instability at the site. Although unlikely, it is possible that a rig leg could punch through the seafloor, either during or after loading. We base this opinion on (1) the existence of the weak clay layer, noted earlier, and (2) the marginal bearing capacity.

Leads off section with major conclusion, for emphasis.

Restates points (made in body) that support conclusion.

Nevertheless, we believe you can still place your platform if you follow careful rig-loading procedures. Specifically, take these precautions to reduce your risk:

1. Load the rig in 10-ton increments, waiting 1 hour between loadings.
2. Allow the rig to stand 24 hours after the loading and before placement of workers on board.
3. Have a soils specialist observe the entire loading process to assist with any emergency decisions if problems arise.

Uses list to emphasize recommendations to reduce risk.

As noted at the outset, these conclusions and recommendations are based on preliminary data and analysis. We will complete our final study in three weeks and submit a formal report shortly thereafter.

Again mentions tentative nature of information, to prevent misuse of report.

M-Global, Inc., enjoyed working once again for Big Muddy Oil at its Gulf of Mexico lease holdings. I will phone you this week to see if you have any questions about our study. If you need information before then, please give me a call.

Maintains contact and shows initiative by offering to call client.

Sincerely,

Bartley Hopkins

Bartley Hopkins, Project Manager
M-Global, Inc.
hg

Informal Report (Memo Format)

TO: Gary Lane
FROM: Jeff Bilstrom JB
SUBJECT: Creation of Logo for Montrose Service Center
DATE: October 3, 2012

Gives concise view of problem—and his proposed solution.

Part of my job as director of public relations is to get the Montrose name firmly entrenched in the minds of metro Atlanta residents. Having recently reviewed the contacts we have with the public, I believe we are sending a confusing message about the many services we offer retired citizens in this area.

To remedy the problem, I propose we adopt a logo to serve as an umbrella for all services and agencies supported by the Montrose Service Center. This proposal gives details about the problem and the proposed solution, including costs.

The Problem

Includes effective lead-in.

The lack of a logo presents a number of problems related to marketing the center's services and informing the public. Here are a few:

Uses bulleted list to highlight main difficulties posed by current situation.

- The letterhead mentions the organization's name in small type, with none of the impact that an accompanying logo would have.
- The current brochure needs the flair that could be provided by a logo on the cover page, rather than just the page of text and headings that we now have.
- Our 14 vehicles are difficult to identify because there is only the lettered organization name on the sides without any readily identifiable graphic.
- The sign in front of our campus, a main piece of free advertising, could better spread the word about Montrose if it contained a catchy logo.
- Other signs around campus could display the logo, as a way of reinforcing our identity and labeling buildings.

Ends section with good transition to next section.

It's clear that without a logo, the Montrose Service Center misses an excellent opportunity to educate the public about its services.

The Solution

Starts with main point—need for logo.

I believe a professionally designed logo could give the Montrose Service Center a more distinct identity. Helping to tie together all branches of our operation, it would give the public an easy-to-recognize symbol. As a result, there would be a stronger awareness of the center on the part of potential users and financial contributors.

■ Model 10–2 ■ Informal proposal (memo format)

Gary Lane
October 3, 2012
Page 2

The new logo could be used immediately to do the following:

- Design and print letterhead, envelopes, business cards, and a new brochure.
- Develop a decal for all company vehicles that would identify them as belonging to Montrose.
- Develop new signs for the entire campus, to include a new sign for the entrance to the campus, one sign at the entrance to the Blane Workshop, and one sign at the entrance to the Administration Building.

Focuses on benefits of proposed change.

Cost

Developing a new logo can be quite expensive. However, I have been able to get the name of a well-respected graphic artist in Atlanta who is willing to donate his services in the creation of a new logo. All that we must do is give him some general guidelines to follow and then choose among 8–10 rough sketches. Once a decision is made, the artist will provide a camera-ready copy of the new logo.

Emphasizes benefit of possible price break.

• Design charge	$0.00
• Charge for new letterhead, envelopes, business cards, and brochures (min. order)	545.65
• Decal for vehicles 14 @ $50.00 + 4%	728.00
• Signs for campus	415.28
Total Cost	$1,688.93

Uses listing to clarify costs.

Conclusion

As the retirement population of Atlanta increases in the next few years, there will be a much greater need for the services of the Montrose Service Center. Because of that need, it's in our best interests to keep this growing market informed about the organization.

Closes with major benefit to reader and urge to action.

I'll stop by later this week to discuss any questions you might have about this proposal.

Keeps control of next step.

Informative Reports

- Most common type of document used in organizations.
- Provides a record of the organizations history in detail.
- Can be archived for future reference.
- Usually have different templates from other organizations.

Four Common Informative Reports

- Activity Reports
- Progress Reports
- Regulatory Reports
- Lab Reports

Activity Reports

- Written in sets of periods: *weekly, monthly, quarterly, etc.*
- Periodic self evaluations written as forms.
- Different types of activity reports: *trip report, incident report*
- Can be automated with stored data

Activity Report ABC Format

- **Abstract**: Time period, project, or event covered in report.
- **Body:** List of activities or events
  - Organization that emphasizes type of activity, by project, or by client.
  - Problems important to reader.
- **Conclusion:** Future actions
  - Actions for continuing and ongoing activities.
  - Plans for addressing problems or for the time period covered by the next report.

Progress Reports

- Used to cover the progress of specific data.
- Contain mostly objective data.
- Used to that the project is on time, and on budget.

Progress Report ABC Format

- **Abstract:** Project and general progress.
- **Body:** Description of work completed since last report.
  - Explanation of incomplete work
  - Description of work remaining
- **Conclusion:** Brief restatement of work since last report.
  - Expression of confidence in overall task

Regulatory Reports

- Required by most organizations to show that they are in compliance with federal, state and local regulations.
- Some highly regulated industries hire technical communicators for their reports

Regulatory Report ABC Format

- **Abstract:** Reference to standards or regulations that are the subject of the report.
- **Body:** Detailed information about the findings
  - Description of observations
  - Description of problem observed
- **Conclusion:** Summary of the degree of compliance.
  - Improvement Recommendations

Lab Reports

- Used by college students and technical organizations alike.
- Used to communicate the results of laboratory results.
- May also be included in analytical reports.

Lab Report ABC Format

- **Abstract:** Summary of laboratory investigation.
  - Purpose of investigation
- **Body:** Summary of laboratory results.
  - Unusual problems or occurrences.
- **Conclusion:** Statement or restatement of main result
  - Implications of further testing or work

Questions for analytical report writing

1. What is the situation or problem that has prompted the report?
2. Will the reader use the report to understand a situation, to solve a problem, or to implement improvements?
3. What information does the reader need to act?
4. What criteria will be used to make a decision?
5. What information do the criteria call for?

Problem Analysis

1. Problem analyses, whose main focus is problems
2. Recommendation reports, whose main focus is solutions.
3. Be aware that during your career, you may be called on to write reports that combine both types.

ABC Format: Problem Analysis

- **ABSTRACT:** Purpose of report
  - Capsule summary of problems covered in report discussion
- **BODY:** Background on source of problems
  - Well-organized description of the problems observed
  - Data that support your observations
  - Consequences of the problems
- **CONCLUSION:** Brief restatement of main problems (unless report is so short that such restatement would seem repetitious)
  - Degree of urgency required in handling problems
  - Suggested next step

Recommendation Reports

- Specific Suggestions regarding a domain.
- Domains: personnel, equipment, procedures, products, and services.
- Persuasion using objective data.

ABC Format: Recommendation Report

- **ABSTRACT:** Purpose of report
  - Brief reference to problem to which recommendations respond
  - Capsule summary of recommendations covered in report discussion
- **BODY:** Details about problem, if necessary
  - Description of options
  - Data that support recommendations (with reference to attachments, if any)
  - Main benefits of recommendations
  - Any possible drawbacks
- **CONCLUSION:** Brief statement or restatement of main recommendations (optional)
  - The main benefit of recommended change
  - Your offer to help with next step

Feasibility Studies

- Practicality of a proposed policy, product, service, or other change within an organization.
- Costs, alternatives, and likely effects.
- Adopt or reject the one idea discussed.
- To opt one of several alternatives presented in the study.

ABC Format: Feasibility Study

- **ABSTRACT:** Capsule summary of information for the most important readers (i.e., the decision makers)
  - Brief statement about who has authorized the study and for what purpose
  - Brief mention of the criteria used during the evaluation
  - Brief reference to your recommendation
- **BODY:** Details that support whatever conclusions and recommendations the study contains, working logically from fact toward opinion
  - Organization that compares advantages and disadvantages of each option
  - Description of evaluation criteria used during your study
  - Description of exactly *what* was evaluated and *how*, especially if you are comparing several items
- **CONCLUSION:** Wrap-up in which you state conclusions and recommendations resulting from the study

Equipment Evaluations

- How equipment has, or has not, functioned.
- Machinery, tools, vehicles, office supplies, computer hardware, and computer software.

ABC Format: Equipment Evaluation

- **ABSTRACT:** Purpose of report
  - Capsule summary of what your report says about the equipment
  - Reason for the evaluation
- **BODY:** Thorough description of the equipment being evaluated
  - Well-organized critique, either analyzing the parts of one piece of equipment or contrasting several pieces of similar equipment according to selected criteria
  - Additional supporting data, with reference to any attachments
- **CONCLUSION:** Brief restatement of major findings, conclusions, or recommendations

▼ Chap 11

Activity report: An informal report, usually directed within your own organization, which summarizes an event or records work on a specific project or during a specific time period.

ABC Format: Activity Reports

- **ABSTRACT:** Time period, project, or event covered in report.
- **BODY:** List of activities or events
  - Organization that emphasizes type of activity, by project, or by client
  - Problems important to reader
- **CONCLUSION:** Future actions
  - Actions for continuing and ongoing activities
  - Plans for addressing problems or for the time period covered by the next report

Progress report: An informal report that provides your manager or client with details about work on a specific project. Often you agree at the beginning of a project to

submit a certain number of progress reports at certain intervals. The final progress report, submitted when a project is completed, is often called a project completion report

ABC Format: Progress Report

- **ABSTRACT:** Project and general progress (e.g., second week of a four-week project)
  - Capsule summary of main project(s)
  - Main progress to date or since last report
- **BODY:** Description of work completed since last report
  - Organization emphasizes task, chronology, or both
  - Clear reference to any dead ends that may have taken considerable time but yielded no results
  - Explanation of delays or incomplete work
  - Description of work remaining on project(s), organized by task, by time, or by both
  - Reference to attachments that may contain more specific information
- **CONCLUSION:** Brief restatement of work since last reporting period
  - Expression of confidence or concern about overall work on project(s)
  - Indication of your willingness to make any adjustments the reader may want to suggest

Regulatory report: A report written for an external audience—a regulatory agency—asserting and documenting an organization's compliance with standards and regulations. Regulatory reports may be submitted at required intervals and may use a required format

ABC Format: Regulatory Reports

- **ABSTRACT:** Reference to standards or regulations that are the subject of the report.
  - Summary of the findings, including statement of extent to which the organization is in compliance
  - Summary of recommended actions
- **BODY:** Detailed information about the findings
  - Organization that emphasizes required activities or documents
  - Description of observations
  - Description of problems observed
  - Data that support observations
- **CONCLUSION:** Summary of degree of compliance with regulations
  - Recommendations for improvement of compliance
  - Summary of consequences if problems are not addressed in a timely manner

Lab report: An informal report that describes work done in any laboratory It may be directed to someone inside or outside your own organization. Also, it may stand on its own, or it may become part of a larger report that uses the laboratory work as supporting detail.

ABC Format: Lab Report

- **ABSTRACT:** Summary of laboratory investigation
  - Purpose of laboratory investigation
  - Nature of investigation, such as material tested, process analyzed
  - Qualifications of investigator
  - Equipment used
  - Capsule summary of results
- **BODY:** Purpose or hypothesis of lab work
  - Organization that emphasizes procedures or methods used in the lab test
  - Unusual problems or occurrences
  - Results of the test with reference to your expectations (results may appear in conclusion, instead)
- **CONCLUSION:** Statement or restatement of main results
  - Recommendations, if requested
  - Implications of lab test for further work

Problem analysis: A report that presents readers with a detailed description of problems in areas such as personnel, equipment, products, and services. Its main goal is to provide objective information so that the readers can choose the next step. Any opinions must be well supported by facts.

ABC Format: Problem Analysis

- **ABSTRACT:** Purpose of report
  - Capsule summary of problems covered in report discussion
- **BODY:** Background on source of problems
  - Well-organized description of the problems observed
  - Data that support your observations
  - Consequences of the problems
- **CONCLUSION:** Brief restatement of main problems (unless report is so short that such restatement would seem repetitious)
  - Degree of urgency required in handling problems
  - Suggested next step

Recommendation report: A report that presents readers with specific suggestions that affect areas such as personnel, equipment, procedures, products, and services. Although the report's main purpose is to persuade, every recommendation must be supported by objective data.

ABC Format: Recommendation Report

- **ABSTRACT:** Purpose of report
  - Brief reference to problem to which recommendations respond
  - Capsule summary of recommendations covered in report discussion
- **BODY:** Details about problem, if necessary
  - Description of options
  - Data that support recommendations (with reference to attachments, if any)
  - Main benefits of recommendations
  - Any possible drawbacks
- **CONCLUSION:** Brief statement or restatement of main recommendations (optional)
  - The main benefit of recommended change
  - Your offer to help with next step

Feasibility study: A document written to show the practicality of a proposed policy, product, service, or other change within an organization. Often prompted by ideas suggested in a proposal, a feasibility study examines details such as costs, alternatives, and likely effects. Although they must reflect the objectivity of a report, most feasibility studies also try to convince readers either (1) to adopt or reject the one idea discussed or (2) to adopt one of several alternatives presented in the study.

ABC Format: Feasibility Study

- **ABSTRACT:** Capsule summary of information for the most important readers (i.e., the decision makers)
  - Brief statement about who has authorized the study and for what purpose
  - Brief mention of the criteria used during the evaluation
  - Brief reference to your recommendation
- **BODY:** Details that support whatever conclusions and recommendations the study contains, working logically from fact toward opinion
  - Organization that compares advantages and disadvantages of each option
  - Description of evaluation criteria used during your study
  - Description of exactly *what* was evaluated and *how*, especially if you are comparing several items
- **CONCLUSION:** Wrap-up in which you state conclusions and recommendations resulting from the study

Equipment evaluation: An informal report that provides objective data about how equipment has, or has not, functioned. The report may cover topics such as machinery, tools, vehicles, office supplies, computer hardware, and computer software.

ABC Format: Equipment Evaluation

- **ABSTRACT:** Purpose of report
  - Capsule summary of what your report says about the equipment
  - Reason for the evaluation
- **BODY:** Thorough description of the equipment being evaluated
  - Well-organized critique, either analyzing the parts of one piece of equipment or contrasting several pieces of similar equipment according to selected criteria
  - Additional supporting data, with reference to any attachments
- **CONCLUSION:** Brief restatement of major findings, conclusions, or recommendations

▼ Chap 12

Proposal: A document written to convince your readers to adopt or support an idea, a product, or a service. It can be directed to colleagues inside your own organization

Proposals may be

- **unsolicited** – developed by a writer who wants to recommend a change

- Description of problem or project and its significance
- Proposed solution or approach
- Personnel
- Schedule
- Costs
- Emphasize a main benefit or feature of your proposal
- Restate your interest in doing the work
- Indicate what should happen next
- Encourage your readers to contact you with questions

ABC Format: Unsolicited Proposal

- **ABSTRACT:** Gives a summary or "big picture" for those who make decisions about your proposal.
  - The need—a problem to be solved or situation to be improved
  - Summary of the solution
- **BODY:** Gives the details about exactly what you are proposing to do.
- **CONCLUSION:** Drives home the main benefit and makes clear the next step.

- **solicited** — written at the request of the reader.
  - Technical sections
    - Respond thoroughly to the client's concerns, as expressed in writing or meetings.
    - Follow whatever organization plan can be inferred from the request for proposal.
    - Use frequent subheadings with specific wording.
    - Back up all claims with facts.
  - Management sections
    - Describe who will do the work.
    - Explain when the work will be done.
    - Display schedules graphically.
    - Highlight personnel qualifications (but put résumés in appendixes).
  - Cost section
    - Make costs extremely easy to find.
    - Use formal or informal tables when possible.
    - Emphasize value received for costs.
    - Be clear about add-on costs or options.
    - Always total your costs.

ABC Format: Solicited Proposal

- **ABSTRACT:** Overview of the scope and desired outcomes
  - Scope of the proposal
  - Restatement of the situation or problem
  - Summary of proposing organization's qualifications
  - Benefits of the proposal
  - Overview of the general organization of the proposal
- **BODY:** Details of the proposed plan, product, or service
  - Summary of the current situation
  - Background information and data as appropriate
  - Technical information
  - Management information
  - Cost information
  - (Appendixes—appear after text, but support body section)
- **CONCLUSION:**
  - Benefits of accepting the proposal
  - Unique qualifications of the proposing organization

Grant proposal: A document written to convince your readers to support a specific project that meets the needs of a social or professional community. Directed to organizations that fund research and other activities, grant proposals help granting organization meet their goals for improving communities. These communities may be local, or they may be global

ABC Format: Grant Proposal

- **ABSTRACT:** Overview of the project
  - Statement of need
  - Mission of your organization
  - Explanation of how the proposed program will meet the goals of the granting organization
- **BODY:** Details of the proposal
  - Background information about your organization
  - Detailed explanation of the situation, including data and other supporting research
  - Objectives to be used to evaluate the success of the proposed program
  - Importance of proposal to the community
  - How results will be shared (for research grants)
  - Budget
- **CONCLUSION:** Importance of the project
  - Summary of community needs to be met
  - How community needs fit the granting organization goals
  - Main reason why your organization is best suited to meet the community need

	Internal Audience	**External Audience**
Unsolicited proposal	> Suggests changes within an organization. > Often written as an informal, memo proposal. > May be formatted as a formal document if the proposal is expensive or suggests a major change, or if the primary audience is at the highest decision-making level (such as a board of directors).	> Recommends product or service to potential client. > A rare form of proposal—may be written as an informal letter proposal or preproposal that offers to solve a problem and introduces the organization's qualifications. > Usually followed by a formal, solicited proposal.
Solicited proposal	> Suggests ways to solve problems or improve practices within an organization. > Written at the request of another member of the organization. > May be followed by a feasibility study. > May be informal or formal in format, depending on complexity of the project and preferences of the reader.	> Meets a specific need described by a client. > Often a formal proposal written in response to a request for proposal (RFP). > May be an informal letter proposal if it has been requested by a client as part of an ongoing business relationship.
Grant proposal	> requests support for special internal projects. > Rare, although some organizations may make money available through a foundation or other special fund. > Often written in informal, memo format.	> Requests support to meet a community need. > Formal document written in response to established guidelines or to a specific RFP. > Addressed to nonprofit organizations, professional organizations, or government agencies.

- Guidelines for Proposals
  - Plan well before you write
  - Make text visually appealing
  - Edit carefully

▼ Chap 15

- reasons for presentation
  - getting hired
  - getting and keeping customers
  - contributing to ur profession
  - contributing to ur community
  - getting promoted
- parts of presentation
  - format(formal/informal)
  - Length
  - Number of presenters
  - content
- Guidelines for presentation
  - know ur listeners
  - use the preachers’s maxim

    > First you tell ’em what you’re gonna tell ’em, then you tell ’em, and then you tell ’em what you told ’em.

    - Example: “The final benefit of the new safety plan will be improved morale among the field workers at all our job sites.”
  - stick to the main points
  - practice, practice, practice
  - Speak Vigorously and Deliberately
    - Vigorously means with enthusiasm; deliberately means with care, attention, and appropriate emphasis on words and phrases
  - avoid fillers
  - Use Rhetorical Questions
    - Rhetorical questions are those you ask to get listeners thinking about a topic, not those that you would expect them to answer out loud.
    - when
      - As a grabber at the beginning of a speech
      - As a transition between major points
      - As an attention getter right before your conclusion
  - Maintain Eye Contact
  - Use Appropriate Gestures and Posture

ABC Format: Presentations

- **ABSTRACT:** Subject of presentation and overview of key topics
- **BODY:** Key topics in same order as presented in abstract
- **CONCLUSION:** Review of main ideas discussed in presentation and suggestion of how audience members should respond

- **Guidelines for Presentation Graphics**
  - Discover Listener Preferences
  - Match the Graphics to the Content
  - Keep the Message Simple
    - Use few words, emphasizing just one idea on each frame.
      Note: A common PowerPoint mistake is the use of too much text, which then gets
    - read to the audience by the speaker.
    - Use more white space, perhaps as much as 60%–70% per frame.
    - Use landscape format more often than portrait, especially because it is the preferred default setting for most presentation software.
    - Use sans-serif large print, from 14 pt. to 18 pt. minimum for text to 48 pt. for titles.
  - Consider Alternatives to Bulleted Lists
  - Use Colors Carefully
  - Leave Graphics Up Long Enough
  - Avoid Handouts
  - Maintain Eye Contact While Using Graphics
  - Plan for Technology to Fail

▼ Chap 16

- **ABC Format: Job Letters**
  - **ABSTRACT:** Apply for a specific job.
    - Refer to ad, mutual friend, or other source of information about the job.
    - Briefly state how you can meet the main need of your potential employer
    - Maintain the “you” attitude throughout
  - **BODY:** Specify your understanding of the reader’s main needs
    - Provide your main qualifications that satisfy these needs (but only highlight points from your résumé—do not simply repeat all résumé information)
    - Address specific qualifications mentioned in a job announcement
    - Discuss skills or experience listed on the résumé that are directly related to the job announcement
    - Avoid mentioning weak points or deficiencies
    - Keep body paragraphs to six or fewer lines
    - Use a bulleted or numbered list if it helps draw attention to three or four main points
  - **CONCLUSION:** Tie the letter together with one main theme or selling point, as you would a sales letter
    - Refer to your résumé

        - Explain how and when the reader can contact you for an interview
- **Resume Formats**
- Chronological Format
- Functional Format
    - works best if
        - you wish to emphasize the skills and strengths you have developed in your career rather than specific jobs you have had
        - you have had “gaps” in your work history that would be obvious if you used the chronological format.
- Combined Format

▼ Doc Examples

12 Peachtree Street
Atlanta GA 30056
404.555.7524

August 2, 2012

Professor Willard R Burton PhD
Department of Civil Engineering
Southern University of Technology
Paris GA 30007

Dear Professor Burton:

Thanks very much for your hospitality during my visit to your class yesterday. I appreciated the interest your students showed in my presentation on stress fractures in highway bridges. Their questions were very perceptive.

Expresses appreciation *and* provides lead-into body.

You may recall that several students requested further information on M-Global, so I have enclosed a dozen brochures for any students who may be interested. As you know, job openings for civil engineering graduates have increased markedly in the last five years. Some of the best opportunities lie in these three areas of the discipline:

Responds to question that arose at class presentation.

- Evaluation of environmental problems
- Renovation of the nation’s infrastructure
- Management of construction projects

Uses bulleted list to emphasize information of value to professor’s students.

These areas are three of M-Global’s main interests. As a result, we are always searching for top-notch graduates from solid departments like yours.

Adds unobtrusive reference to M-Global’s needs.

Again, I enjoyed my visit back to Southern last Friday, Professor Burton. Please call when you want additional guest lectures by me or other members of M-Global’s staff.

Closes with offer to visit class again.

Sincerely,

George F. Lux, P.E.

George F Lux

Enclosures

Includes reference to enclosures.

M-GLOBAL, INC.

M-Global Inc | 127 Rainbow Lane | Baltimore MD 21202 | 410.555.8175

MEMO

DATE: December 4, 2012
TO: Technical Staff
FROM: Ralph Simmons, Technical Manager **RS**
SUBJECT: New employee to help with technical editing

Uses informative subject line.

Gives purpose of memo and highlights contents.

Last week we hired an editor to help you produce top-quality reports, proposals, and other documents. This memo gives you some background on this change, highlights the credentials of our new editor, and explains what the change will mean to you.

Uses side headings for easy reading.

PROBLEM: TIME SPENT EDITING AND PROOFREADING

At September's staff meeting, many technical staff members noted the excessive time spent editing and proofreading. For example, some of you said that this final stage of writing takes from 15 to 30 percent of the billable time on an average report. Most important, editing often ends up being done by project managers—the employees with the highest billable time.

Shows that the change arose from *their* concerns.

Despite these editing efforts, many errors still show up in documents that go out the door. Last month I asked a professional association, the Engineers Professional Society (EPS), to evaluate M-Global-Boston documents for editorial correctness. (EPS performs this service for members on a confidential basis.) The resulting report showed that our final reports and proposals need considerable editing work. Given your comments at September's meeting and the results of the EPS peer review, I began searching for a solution.

Adds evidence from outside observer.

SOLUTION: IN-HOUSE EDITOR

Gives important information about Ron in *first* sentence.

To come to grips with this editing problem, the office just hired Ron Perez, an experienced technical editor. He'll start work January 3. For the last six years, Ron has worked as an editor at Jones Technical Services, a Toronto firm that does work similar to ours. Before that he completed a master's degree in technical writing at Sage University in Buffalo.

Establishes his credibility.

At next week's staff meeting, we'll discuss the best way to use Ron's skills to help us out. For now, he will be getting to know our work by reviewing recent reports and proposals. Also, the attached list of possible activities can serve as a springboard for our discussion.

Refers to attachment.

CONCLUSION

Focuses on *benefit* of change to reader.

By working together with Ron, we'll be able to improve the editorial quality of our documents, free up more of our time for technical tasks, and save the client and ourselves some money.

Restates next action to occur.

I look forward to meeting with you next week to discuss the best use of Ron's services.

Enclosure
Copy: Ron Perez

M-GLOBAL INC.

M-Global Inc | 127 Rainbow Lane | Baltimore MD 21202 | 410.555.8175

From: "James Thuvenot" jthuvenot@rbirdarc.com
To: "Evelyn Dame" edame@m-global.com
Date: 3/14/2012 8:14 AM
Subject: RE: Riverview Shopping Center Project

Evelyn,

Thanks for the information. I just heard about the construction on the radio this morning and wondered if it would cause us problems.

So far, everything looks like it's going well.

Thanks for your good work.

Jim

James Thuvenot
Redbird Architects
335 River Ave.
Columbia, Illinois 62236

>Jim,

>We've just been informed that construction on the JB Bridge will start next
>month. We are adjusting our work schedule so that most of the material and
>equipment will be delivered to the Columbia worksite before the bridge
>construction begins.

>Although we may run into a few problems, we don't expect
>the bridge construction to delay the completion of the project by more than 2 or
>3 weeks.
>
>Please let me know if you have any questions or concerns.

>Evelyn Dame
>Project Manager
>M-Global St. Louis

M-GLOBAL, INC.

M-Global Inc | 127 Rainbow Lane | Baltimore MD 21202 | 410.555.8175

MEMO

DATE: May 2, 2012
TO: All Employees of Cleveland Office
FROM: Timothy Fu, Personnel Director TF
SUBJECT: New Cost Containment Measure for Health Care

Puts this memo in context of all benefits changes.

The next fiscal year will bring several changes in the company's fringe benefit plan. Later this month, you'll receive a complete report on all adjustments to go into effect July 1. For now, this memo will outline one major change in health care. Specifically, M-Global will adopt a cost containment program called PAC—intended to help you and the company get more health care for the dollar.

Emphasizes point of *agreement*—concerns about costs. Describes problem that led to need for change.

WHAT IS PAC AND HOW DOES IT WORK?

Health costs have risen dramatically in the last 10 years. The immediate effect on M-Global has been major increases in insurance premiums. Both you and the company have shared this burden. This year M-Global will fight this inflationary trend by introducing a new cost containment program called PAC—Pre-Admission Check.

Gives overview of program.

Started by Healthco, our company medical supplier, PAC changes the procedure by which you and your dependents will be recommended for hospitalization. Except in emergencies, you or your physician will need to call the PAC hotline before admission to the hospital. The PAC medical staff will do the following:

Uses list to highlight three main elements of PAC.

1. Review the length of stay recommended by your physician, to make sure it conforms to general practice
2. Request a second opinion if the PAC staff believes that such an opinion is warranted
3. Approve final plans for hospitalization

If your physician recommends that you stay in the hospital beyond the time originally planned, he or she will call PAC for authorization.

Uses heading to focus on *main* concern of reader—*quality of care*.

WILL PAC AFFECT THE LEVEL OR QUALITY OF HEALTH CARE?

No. PAC will in no way restrict your health care or increase your personal costs. Quite the contrary, it may reduce total costs considerably, leading to a stabilization of the employee contributions to premiums next year. The goal is to make sure physicians give careful scrutiny to the length of hospital stays, staying within the norms associated with a particular illness unless there is good reason to do otherwise.

Indicates that similar programs have worked well elsewhere.

Programs like PAC have worked well for many other firms around the country; there is a track record of lowering costs and working efficiently with physicians and hospitals. Also, you will be glad to know that Healthco has the firm support of its member physicians on this program.

M-Global Inc | 127 Rainbow Lane | Baltimore MD 21202 | 410.555.8175

MEMO TO: all employees
MAY 2, 2012
Page 2

Leaves reader with clear sense of next step.

WHAT WILL HAPPEN NEXT?

As mentioned earlier, this change goes into effect with the beginning of the new fiscal year on July 1. Soon you will receive a report about this and other changes in benefits. If you have any questions before that time, please call the Corporate Benefits Department at ext. 678.

12 Post Street
Houston Texas 77000
(713) 555-9781

April 22, 2012

Big Muddy Oil Company Inc
12 Rankin St
Abilene TX 79224

ATTENTION: Mr. James Smith, Engineering Manager

Includes specific title.

SHARK PASS STUDY
BLOCK 15, AREA 43-B
GULF OF MEXICO

Uses *optional* heading for abstract part of ABC format.

INTRODUCTORY SUMMARY

You recently asked our firm to complete a preliminary soils investigation at an offshore rig site. This report presents the tentative results of our study, including major conclusions and recommendations. A longer, formal report will follow at the end of the project.

Draws attention to *main point* of report.

On the basis of what we have learned so far, it is our opinion that you can safely place an oil platform at the Shark Pass site. To limit the chance of a rig leg punching into the seafloor, however, we suggest you follow the recommendations in this report.

WORK AT THE PROJECT SITE

Gives on-site details of project—dates, location, tasks.

On April 15 and 16, 2012, M-Global's engineers and technicians worked at the Block 15 site in the Shark Pass region of the gulf. Using M-Global's leased drill ship, *Seeker II,* as a base of operations, our crew performed these main tasks:

- Seismic survey of the project study area
- Two soil borings of 40 feet each

Uses *lead-in* to subsections that follow.

Both seismic data and soil samples were brought to our Houston office the next day for laboratory analysis.

LABORATORY ANALYSIS

On April 17 and 18, our lab staff examined the soil samples, completed bearing capacity tests, and evaluated seismic data. Here are the results of that analysis.

Soil Layers

Highlights most important point about soil layer—that is, the *weak clay*.

Our initial evaluation of the soil samples reveals a 7- to 9-foot layer of weak clay starting a few feet below the seafloor. Other than that layer, the composition of the soils seems fairly typical of other sites nearby.

M-GLOBAL, INC.

M-Global Inc | 127 Rainbow Lane | Baltimore MD 21202 | 410.555.8175

Model 10–1 Informal report (letter format)

Bearing Capacity

We used the most reliable procedure available, the XYZ method, to determine the soil's bearing capacity (i.e., its ability to withstand the weight of a loaded oil rig). That method required that we apply the following formula:

Notes *why* this method was chosen (i.e., reliability).

$Q = cNv + tY$, where
Q = ultimate bearing capacity
c = average cohesive shear strength
Nv = the dimensionless bearing capacity factor
t = footing displacement
Y = weight of the soil unit

The final bearing capacity figure will be submitted in the final report, after we repeat the tests.

Seafloor Surface

By pulling our underwater seismometer back and forth across the project site, we developed a seismic "map" of the seafloor surface. That map seems typical of the flat floor expected in that area of the gulf. The only exception is the presence of what appears to be a small sunken boat. This wreck, however, is not in the immediate area of the proposed platform site.

Explains both *how* the mapping procedure was done and *what results* it produced.

CONCLUSIONS AND RECOMMENDATIONS

Based on our analysis, we conclude that there is only a slight risk of instability at the site. Although unlikely, it is possible that a rig leg could punch through the seafloor, either during or after loading. We base this opinion on (1) the existence of the weak clay layer, noted earlier, and (2) the marginal bearing capacity.

Leads off section with major conclusion, for emphasis.

Restates points (made in body) that support conclusion.

Nevertheless, we believe you can still place your platform if you follow careful rig-loading procedures. Specifically, take these precautions to reduce your risk:

1. Load the rig in 10-ton increments, waiting 1 hour between loadings.
2. Allow the rig to stand 24 hours after the loading and before placement of workers on board.
3. Have a soils specialist observe the entire loading process to assist with any emergency decisions if problems arise.

Uses list to emphasize recommendations to *reduce* risk.

As noted at the outset, these conclusions and recommendations are based on preliminary data and analysis. We will complete our final study in three weeks and submit a formal report shortly thereafter.

Again mentions tentative nature of information, to prevent misuse of report.

M-Global, Inc., enjoyed working once again for Big Muddy Oil at its Gulf of Mexico lease holdings. I will phone you this week to see if you have any questions about our study. If you need information before then, please give me a call.

Maintains contact and shows initiative by offering to *call* client.

Sincerely,

Bartley Hopkins

Bartley Hopkins, Project Manager
M-Global, Inc.
hg

Model 10–1 continued

TO: Gary Lane
FROM: Jeff Bilstrom *JB*
SUBJECT: Creation of Logo for Montrose Service Center
DATE: October 3, 2012

Gives concise view of problem—*and* his proposed solution.

Part of my job as director of public relations is to get the Montrose name firmly entrenched in the minds of metro Atlanta residents. Having recently reviewed the contacts we have with the public, I believe we are sending a confusing message about the many services we offer retired citizens in this area.

To remedy the problem, I propose we adopt a logo to serve as an umbrella for all services and agencies supported by the Montrose Service Center. This proposal gives details about the problem and the proposed solution, including costs.

The Problem

Includes effective lead-in.

The lack of a logo presents a number of problems related to marketing the center's services and informing the public. Here are a few:

Uses bulleted list to highlight main difficulties posed by current situation.

- The letterhead mentions the organization's name in small type, with none of the impact that an accompanying logo would have.
- The current brochure needs the flair that could be provided by a logo on the cover page, rather than just the page of text and headings that we now have.
- Our 14 vehicles are difficult to identify because there is only the lettered organization name on the sides without any readily identifiable graphic.
- The sign in front of our campus, a main piece of free advertising, could better spread the word about Montrose if it contained a catchy logo.
- Other signs around campus could display the logo, as a way of reinforcing our identity and labeling buildings.

Ends section with good *transition* to next section.

It's clear that without a logo, the Montrose Service Center misses an excellent opportunity to educate the public about its services.

The Solution

Starts with *main point*—need for logo.

I believe a professionally designed logo could give the Montrose Service Center a more distinct identity. Helping to tie together all branches of our operation, it would give the public an easy-to-recognize symbol. As a result, there would be a stronger awareness of the center on the part of potential users and financial contributors.

Model 10–2 Informal proposal (memo format)

The new logo could be used immediately to do the following:

- Design and print letterhead, envelopes, business cards, and a new brochure. ← Focuses on *benefits* of proposed change.
- Develop a decal for all company vehicles that would identify them as belonging to Montrose.
- Develop new signs for the entire campus, to include a new sign for the entrance to the campus, one sign at the entrance to the Blane Workshop, and one sign at the entrance to the Administration Building.

Cost

Developing a new logo can be quite expensive. However, I have been able to get the name of a well-respected graphic artist in Atlanta who is willing to donate his services in the creation of a new logo. All that we must do is give him some general guidelines to follow and then choose among 8–10 rough sketches. Once a decision is made, the artist will provide a camera-ready copy of the new logo. ← Emphasizes *benefit* of possible price break.

• Design charge	$0.00
• Charge for new letterhead, envelopes, business cards, and brochures (min. order)	545.65
• Decal for vehicles 14 @ $50.00 + 4%	728.00
• Signs for campus	415.28
Total Cost	$1,688.93

← Uses *listing* to clarify costs.

Conclusion

As the retirement population of Atlanta increases in the next few years, there will be a much greater need for the services of the Montrose Service Center. Because of that need, it's in our best interests to keep this growing market informed about the organization. ← Closes with major benefit to reader and urge to action.

I'll stop by later this week to discuss any questions you might have about this proposal. ← Keeps control of next step.

Model 10–2 continued

MEMORANDUM

TO: Ralph Buzby, Manager of Engineering
FROM: Nancy Fairbanks, Project Manager NF
DATE: August 1, 2012
SUBJECT: Activity Report for July 2012

Begins with overview of entire report.

July has been a busy month in our group. Besides starting and finishing many smaller jobs, we completed the Jones Fill project. Also, the John Lewis Dam borings began just a week ago. Finally, I did some marketing work and several performance reviews.

SMALL PROJECTS

Gives summary of small projects.

Last month, my group completed nine small projects, each with a budget under $20,000 and each lasting only a few days. These jobs were in three main areas:

Uses list to highlight main types.

1 Surveying subdivisions—five jobs
2 Taking samples from toxic sites—two jobs
3 Doing nearby soil borings—two jobs

Indicates reasons for delays.

All nine were completed within budget. Eight of the nine projects were completed on time. The Campbell County survey, however, was delayed for a day because of storms on July 10.

JONES FILL PROJECT

Again, gives *reasons* for delay.

Our written report on this 12-month job was finally submitted to Trunk Engineering, Inc., on July 23. The delay was caused by Trunk's decision to change the scope of the project again. The firm wanted another soil boring, which we completed on July 22.

JOHN LEWIS DAM PROJECT

As you know, we had hoped to start work at the dam site last month. However, the client decided to make many design changes that had to be approved by subcontractors. The final approval to start came just last week; thus our first day on-site was July 28.

MARKETING

Supports section with *specifics*—for example, the exact number of meetings.

During July, my main marketing effort was to meet with some previous clients, acquainting them with some of our new services. I met with eight different clients at their offices, with two meetings occurring on each of these dates: July 15, 16, 22, and 23. There's a good possibility that several of these meetings will lead to additional waste-management work in the next few months.

M-GLOBAL INC.

M-Global Inc | 127 Rainbow Lane | Baltimore MD 21202 | 410.555.8175

Model 11–1 Activity report

Ralph Buzby
August 1, 2012
Page 2

PERFORMANCE REVIEWS

As we discussed last month, I fell behind on my staff's performance reviews in June. In July, I completed the three delayed reviews, as well as the four that were due in July. Copies of the paperwork were sent to your office and to the Personnel Department on July 18. This brings us up to date on all performance reviews.

CONCLUSION

July was a busy month in almost all phases of my job. Because of this pace, I haven't had time to work on the in-house training course you asked me to develop. In fact, I'm concerned that time I devote to that project will take me away from my ongoing client jobs. At our next meeting, perhaps we should brainstorm about some solutions to this problem.

Lays foundation for *next* meeting.

Clearly identifies goal of the proposal.

Because short, informal, and internal, does not require heading for introduction section.

Draws attention to important data with table.

Ends introduction section with two main advantages.

Identifies problem and solution sections clearly by headings.

Memo

To: Jack Conners
From: Walker Smith
Date: July 17, 2012
Subject: Construction Site Safety Training

Several of the crew supervisors have mentioned that the accident rate at our job sites seems to be increasing. When I checked our records to see if their impressions were correct, I learned that over the past six months we have had a troubling increase in accidents over previous six-month periods. (See the table below.) That record is unacceptable.

Time period covered	Minor accidents (first aid at job site)	Major accidents (emergency room visit)
July 2010–Dec. 2010	10	0
Jan. 2011–June 2011	12	1
July 2011–Dec. 2011	14	0
Jan. 2012-June 2012	26	4

Although the accidents were generally minor, clearly we need to improve job site safety before someone is seriously hurt. Of course, we want to avoid the costs related to these injuries, but we also owe it to our employees to provide a safe work environment. We want to continue to be proud of our safety record.

Construction site safety problems

As the table above shows, a review of our job site accident reports indicates that accidents have been increasing, although the number of employees working at our construction sites has not increased. The only conclusion is that safety practices are not being followed appropriately.

I considered several possibilities for the increase in the number of accidents we have been experiencing:

Equipment failure? Our equipment is in good shape. We have a clear schedule for maintaining equipment, and the process for repairing and replacing equipment seems to be working well. Faulty equipment is not the cause of most accidents.

Low-quality materials? Although some of our clients have tried to cut costs by using lower-grade materials, we have generally been able to convince them that using higher-quality building materials is a long-term investment. Even if we were using lower-grade materials, none of the accident reports suggest that materials were to blame.

Shortcuts to save time? This may be a contributing factor. We have been trying to complete jobs more quickly to save money for our clients, or to avoid paying fines for missing deadlines. Although we may want to revisit our schedule

Model 12–1 Unsolicited informal proposal

plans, there are other considerations. Crew supervisors need to make sure that safety is not sacrificed for time savings. Also, to save time, we have adopted some new techniques and equipment that our employees are not familiar with. We have relied on on-the-job learning, which is clearly not working.

Makes conclusion from data clear.

Unskilled employees? During the past six months, we have hired 21 new employees to work construction. Many of these are recent high school or trade school graduates we have hired as part of our program to encourage more people to enter the construction trades. That means that almost 30 percent of our on-site workers are new to our company, and most of them are new to construction. We have assumed that the employee handbook we give them, along with instruction from their unions and from our more experienced employees, would be enough. Clearly, that hasn't been the case.

Offers reader options and clearly leaves final decision to him.

Solution: Training program offered by M-Global

After considering several options, including requiring attendance at safety seminars and developing our own safety training program, I think that the construction safety program offered by the local offices of M-Global is our best solution.

I am familiar with M-Global's program through its projects where we have worked as subcontractors. I have also asked people who have been through M-Global's construction safety program, and they recommend it. Their accident rates have dropped as much as 60 percent after the training.

Last week, I spoke to Lou Tia, who runs the M-Global construction safety program here in Cleveland. She said that they can offer a two-part program for us. The first part of the program includes job site visits to observe how we work, what safety precautions we have in place, and how well employees are following safety practices. The second part is a series of workshops. For 20 employees (the number we can comfortably fit into the break room at the main equipment lot), the cost would be $750 per session—a rate she can give us because we have a business relationship with M-Global. We can also negotiate for a contract at a yearly rate. This would cover regular safety training sessions and site safety audits. Because we have been hiring so many new employees, we might want to consider this option.

In the conclusion, emphasizes importance of project to the financial success and ethical practices of the organization.

Conclusion

There are good business and ethical reasons for starting a formal safety program at Conners Construction. Keeping our accident rate low saves us money on workman's comp, and our good record in the past has kept our insurance rates low. We definitely don't want to let this accident trend continue, or we may be facing major medical costs, and even fines, at some point in the future. At the same time, Conners Construction has always been proud to be thought of as a great company to work for. This reputation has allowed us to hire reliable, top-quality employees, and our safety record has made us a leader in the industry.

If you would like to talk more about our proposal, just let me know. I will be happy to set up a meeting with Lou Tia of M-Global.

Invites future contact.

■ **Model 12–1** ■ continued

Professional
Documentation, Inc.

3450 Jones Mill Road
Neming Georgia 30092 (404) 555-8438

January 15, 2012

Mr David Barker
Technical Communication Manager
RBP Software
PO Box 123456
Atlanta Georgia 30339

Dear David:

I enjoyed meeting with you and learning about your new General Ledger software product. Because you require a March release, I can understand why you want to choose an approach to documentation and get the project started.

Shows understanding of client's main concern—*scheduling*.

This proposal describes a strategy for completing the documentation in the 10 weeks between now and your March deadline. Included are these main sections:

Asserts ability to meet scheduling need.

1. Selection of the Best Format
2. Adoption of a Publication Plan
3. Control of Costs
4. Conclusion

Gives helpful overview of sections to follow.

SELECTION OF THE BEST FORMAT

I think your customers will be best served by a combined installation and user's guide. It uses a functional approach to show how General Ledger works. My assessment results from these completed steps:

Uses list to itemize important points—that is, the *basis* for his assessment.

1. Interviews with support staffers responsible for providing technical support to customers using the company's other accounting products
2. Interviews with programmers developing General Ledger, who have an intimate knowledge of how it works
3. Conversations with you that clarified your organization's general expectations for the documentation

The assessment is also based on my experience developing documentation for other products. I strive to use clear, concise prose and ample white space to provide a visually appealing text. The text will be enhanced and supplemented with graphics depicting General Ledger's feature screens. The screens themselves will be captured directly from the program and inserted into the text by your staff using your in-house publishing system.

■ **Model 12–2** ■ Solicited informal proposal

This approach will yield a thorough and easy-to-use document that will allow your customers to take full advantage of General Ledger's many innovative features.

Continues emphasis on benefits to reader.

As you know, writing documentation is a cooperative effort. Each member of the General Ledger product team will play a key role during the development process. To keep us all on track, I have put together a publication plan that shows how the project will progress from beginning to end.

Leads in smoothly to next section.

ADOPTION OF A PUBLICATION PLAN

The publication plan shows how we can have the documentation ready for General Ledger's March unveiling. The four major steps are described here.

Starts with *overview* of sections to follow.

Define the Project

Much of this work has already been accomplished as a result of doing the research for this proposal. As a preliminary step, we will meet and review the project's scope and priority within the organization. We will detail the resources that will be available to complete the project. Most important, we will look at expectations: management's, yours, and the customers'.

Organizes paragraph around three *main points*.

Develop a Schedule

This step is the key to the publication process and ensures a common understanding of what has to be done and in what period of time. It has three basic steps:

- We define the tasks that are part of the project.
- We define the resources we have available to deal with the identified task.
- We assign tasks to the most appropriate individuals.

Uses bulleted list for primary *steps* in project.

Manage the Project

What is good project management? In this plan, good management is essentially good communications. In the first two steps listed above, we define the information that project members must have to understand how the document will be produced and their roles in that process. Ongoing management of the project will be a matter of keeping the channels of communication open.

Introduces section with *question* to attract attention to passage.

Perform a Postmortem

The last step is an evaluation of the effectiveness of the publication plan. It provides the opportunity for us to learn how to do future documentation better. It is important to look back at what went right and what went wrong during a project and to share this information with our client. You will get a complete postmortem report from me after the project is completed.

David Barker
January 15, 2012
Page 3

Shows interest in *following through.* → Throughout the project, this management system will guide us in completing General Ledger's documentation on time and within budget.

Places benefit in heading. → **CONTROL OF COSTS**

Good documentation helps to sell software. By working smart, we can develop documentation that will enhance General Ledger's appeal, and we can do it at a reasonable cost.

Shows he can meet project criteria—but also *clarifies the assumptions* he is making. → My experience in this area and the management system described here will reduce waste and duplication of effort, two factors that affect cost. These savings mean I can bring the project in within the 200-hour cap you mentioned.

This estimate assumes that three of the program's four main features are in a complete, or "fixed," state and that the fourth main feature is about 50 percent complete. This estimate also assumes that all programming will be finished by March 5, which will allow time to put the guide through final review and production.

Returns to *main concern* of reader—scheduling. → **CONCLUSION**

The functional approach, which describes a product in terms of its operations, is the documentation format that will best serve General Ledger customers. Your goal of having the documentation ready by March will be aided by adopting a four-step publication plan. The plan will define the strategy for writing the documentation and will help keep costs down.

Retains *control* of next step. → I'll call you in a few days, David, to answer any questions you might have about this proposal. I can begin work on the documentation as soon as you sign the acceptance block and return a copy of this letter to me.

Sincerely,

Steven Nickels

Steven Nickels
Documentation Specialist

Enclosure

Includes acceptance block to simplify approval process. → ACCEPTED by RBP Software

By: _____
Title: _____
Date: _____

■ Model 12–2 ■ continued

▼ review

informal reports

- feasibility studies
- equipment evaluation
- progress report
- Regulatory report
- Lab report
- Problem analysis
- Recommendation report
- activity report
- Equipment evaluation