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.

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 method w (i.e., reliab

$Q = cNv + tY$, 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

Explains b mapping p done and produced.

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.

CONCLUSIONS AND RECOMMENDATIONS

Leads off s major conc emphasis.

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.

Restates p body) that 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:

Uses list to recommen reduce 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.

Again men tive nature tion, to pre of report.

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.

Maintains shows initi offering to

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.

Sincerely,

Bartley Hopkins

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

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.

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

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

Cost

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

• 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

Conclusion

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

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

Activity Report

Let’s start with the first type of informal reports

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

Case Study

- Nancy Fairbanks is simply submitting her usual monthly report. The greatest challenge in such reports is to classify, divide, and label information in such a way that readers can find what they need quickly. Fairbanks selected the kind of substantive headings that help the reader locate information (e.g., “Jones Fill Project,” “Performance Reviews”).

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

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

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:

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

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

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

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-

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.

Write the conclusion for this report.

Progress Reort

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

Task

Using the informal report guidelines, evaluate the level of effectiveness of the following progress report, which was written as part of the Wildwood Creek project. Develop responses to the following questions:

1. Does the report follow the ABC format? (Explain.)
2. What additional information does the report include? (Give examples.)
3. Who is the audience for the report? (Support your conclusion with evidence from the report)

Case Study

Scott Sampson, M-Global's personnel manager, is in the midst of an internal project being conducted for Jeannie McDuff, Vice President of Domestic Operations. Sampson's goal is to find ways to improve the company's training for technical employees. Having completed two of three phases, he is reporting his progress to McDuff. Note that Sampson organizes the body sections by task. This arrangement helps focus the reader's attention on the two main accomplishments—the successful phone interviews and the potentially useful survey. Also note that Sampson adopts a persuasive tone at the end of the report—that is, he uses his solid progress as a way to emphasize the importance of the project. In this sense, he is "selling" the project to his "internal customer," Jeannie McDuff, who ultimately is in the position to make decisions about the future of technical training at M-Global.

To: Jeannie McDuff, Vice President of Domestic Operations
From: Scott Sampson, Manager of Personnel SS
Date: June 11, 2012
Subject: Progress Report on Training Project

INTRODUCTORY SUMMARY

On May 21, you asked that I study ways our firm can improve training for technical employees in all domestic offices. We agreed that the project would take about six or seven weeks and involve three phases:

Phase 1: Make phone inquiries to competing firms.
Phase 2: Send a survey to our technical people.
Phase 3: Interview a cross section of our technical employees.

I have now completed Phase 1 and part of Phase 2. My observation thus far is that the project will offer many new directions to consider for our technical training program.

WORK COMPLETED

In the first week of the project, I had extensive phone conversations with people at three competing firms about their training programs. Then, in the second week, I wrote and sent out a training survey to all technical employees in M-Global's domestic offices.

Phone Interviews

I contacted three firms for whom we have done similar favors in the past: Simkins Consultants, Judd & Associates, and ABG Engineering. Here is a summary of my conversations:

1. Simkins Consultants
   Talked with Harry Roland, Training Director, on May 22. Harry said that his firm has most success with internal training seminars. Each technical person completes several one- or two-day seminars every year. These courses are conducted by in-house experts or external consultants, depending on the specialty.
2. Judd & Associates
   Talked with Jan Tyler, Manager of Engineering, on May 23. Jan said that Judd, like Simkins, depends mostly on internal seminars. But Judd spreads these seminars over one or two weeks, rather than teaching intensive courses in one or two days. Judd also offers short "technical awareness" sessions during the lunch hour every two weeks. In-house technical experts give informal presen-
3. ABG Engineering
   Talked with Newt, ABG's training program is much as it was two decades ago. Most technical people at high levels go to one seminar a year, usually sponsored by professional societies or local colleges. Other technical people get little training beyond what is provided on the job. In-house training has not worked well, mainly because of schedule conflicts with engineering jobs.

Internal Survey

After completing the phone interviews noted, I began the survey phase of the project. Last week, I finished writing the survey, had it reproduced, and sent it with a cover memo to all 450 technical employees in domestic offices. The deadline for returning it to me is June 17.

Work Planned

With phone interviews finished and the survey mailed, I foresee the following schedule for completing the project:

June 17:	Surveys returned
June 18–20:	Surveys evaluated
June 23–27:	Trips taken to all domestic offices to interview a cross section of technical employees
July 3:	Submission of final project report to you

CONCLUSION

My interviews with competitors gave me a good feel for what technical training might be appropriate for our staff. Now I am hoping for a high-percentage return on the internal survey. That phase will prepare a good foundation for my on-site interviews later this month. I believe this major corporate effort will upgrade our technical training considerably.

I would be glad to hear any suggestions you may have about my work on the rest of the project. For example, please call if you have any particular questions you want

Ethics Questions in the Workplace

Each of the situations that follow presents an ethical dilemma regarding a specific document, followed by an answer to each problem.

Ethics Questions

- **Lab report:** Should you mention a small, possibly insignificant percentage of the data that was collected but that doesn't support your conclusions?
- *Answer:* Yes. Readers deserve to see all the data, even (and perhaps especially) any information that doesn't support your conclusion. They need a true picture of the lab study so that they can draw their own conclusions.

- **Trip report:** Should you mention the fact that one client you visited expressed dissatisfaction with the service he received from your team?
- *Answer:* Yes. Assuming that your report is supposed to present an accurate reflection of your activities, your reader deserves to hear about all your client contacts—good news and bad news. You can counter any critical comments by indicating how your team plans to remedy the problem.

Ethics Questions

- **Feasibility study:** Should you list all the criteria you used in comparing three products, even though one criterion could not be applied adequately in your study?
- *Answer:* Yes. It is unethical to adjust criteria after the fact to accommodate your inability to apply them consistently. Besides, information about a project dead end may be useful to the reader.
- **Technical article:** Should you acknowledge ideas you derived from another article, even though you quoted no information from the piece?
- *Answer:* Yes. Your reliance on all borrowed ideas should be noted, whether the ideas are quoted, paraphrased, or summarized. The exception is common knowledge, which is general information that is found in many sources. Such common knowledge need not be footnoted.

Analysis Reports

1. **Feasibility Studies**
2. **Problem Analysis**
3. **Equipment Evaluation**

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

Case Study

Harold Marshal, a longtime M-Global employee, supervises all technical work aboard the Seeker II, a boat that M-Global leases during the summer. Staffed with several technicians and engineers, the boat is used to collect and test soil samples from the ocean floor. Different clients purchase these data, such as oil companies that must place oil rigs safely and telecommunications companies that must lay cable.

After a summer on the Seeker II, Harold has severe reservations about the safety and technical adequacy of the boat. Yet he knows that his supervisor, Jan Stillwright, will require detailed support of any complaints before she seriously considers negotiating a new boat contract next season. Given this critical audience, Harold focuses on specific problems that affect(1) the safety of the crew, (2) the accuracy of the technical work performed, and (3) the morale of the crew. He believes that this pragmatic approach, rather than an emotional appeal, will best persuade his boss that the problem is serious.

TO: Jan Stillwright, Vice President of Research and Training
FROM: Harold Marshal, Technical Supervisor **HM**
DATE: October 15, 2012
SUBJECT: Boat Problems During Summer Season

INTRODUCTORY SUMMARY

Gives abstract (or *summary*) in first paragraph.

We have just completed a one-month project aboard the leased ship, *Seeker II,* in the Pacific Ocean. All work went just about as planned, with very few delays caused by weather or equipment failure.

Provides *capsule listing* of problems discussed in report.

However, there were some boat problems that need to be solved before we lease *Seeker II* again this season. This report highlights the problems so that they can be brought to the owner's attention. My comments focus on four areas of the boat: drill rig, engineering lab, main engine, and crew quarters.

DRILL RIG

Opens with most *important point*—then qualifies it. Explains problem in *layperson's language*, indicating possible consequences.

Thus far, the rig has operated without incident. Yet on one occasion, I noticed that the elevator for lifting pipe up the derrick swung too close to the derrick itself. A quick gust of wind or a sudden increase in sea height caused these shifts. If the elevator were to hit the derrick, causing the elevator door to open, pipe sections might fall to the deck below.

I believe the whole rig assembly needs to be checked over by someone knowledgeable about its design. Before we put men near that rig again, we need to know that their safety would not be jeopardized by the possibility of falling pipe.

Bedroom

Three of the top bunks had such poor springs that the occupants sank 6 to 12 inches toward the bottom bunks. More important, five of the bunks are not structurally sound enough to keep from swaying in medium to high seas. Finally, most of the locker handles are either broken or about to break.

Describes three problem areas in great detail—knowing the owner will want facts to support complaints.

Bathroom

Poor pressure in three of the commodes made them almost unusable during the last two weeks. Our amateur repairs did not solve the problem, so I think the plumbing leading to the holding tank might be defective.

Laundry Room

We discovered early that the filtering system could not screen the large amount of rust in the old 10,000-gallon tank. Consequently, undergarments and other white clothes turned a yellow-red color and were ruined.

CONCLUSION

As noted at the outset, none of these problems kept us from accomplishing the major goals of this voyage, but they did make the trip much more uncomfortable than it had to be. Moreover, in the case of the rig and engine problems, we were fortunate that injuries and downtime did not occur.

Briefly restates problem, with emphasis on *safety* and *profits*.

I strongly urge that the owner be asked to correct these deficiencies before we consider using *Seeker II* for additional projects this season.

Ends with specific recommendation.

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

Case Study

- Like other firms, M-Global relies on word processing for almost all internal and external documents. It is an evaluation of a new word-processing package used on a trial basis. Melanie Frank, office manager in San Francisco, conducted the trial in her office and wrote the report to the branch manager, Hank Worley. Note that she analyzes each of the software's five main features and then ends with a recommendation, much as in a recommendation report.

MEMO

DATE: July 25, 2013
TO: Hank Worley, Project Manager
FROM: Melanie Frank, Office Manager *MF*
SUBJECT: Evaluation of Best Choice Software

Uses optional first heading for abstract section of ABC format. Gives background, main points, and scope statement.

INTRODUCTORY SUMMARY

When the office purchased one copy of Best Choice Software last month, you suggested I send you an evaluation after 30 days' use. Having now used Best Choice for a month, I have concluded that it meets all our performance expectations. This memo presents our evaluation of the main features of Best Choice.

Notes five main criteria to be evaluated.

HOW BEST CHOICE HELPED US

Best Choice provides five primary features: word processing, file management, spreadsheet, graphics, and a user's guide. My critique of all five features is included here.

Begins paragraph with most important point. Supports claim with evidence.

Word Processing

The system contains an excellent word-processing package that the engineers as well as the secretaries have been able to learn easily. This package can handle both our routine correspondence and the lengthy reports that our group generates. Of particular help is the system's 90,000-word dictionary, which can be updated at any time. The spelling correction feature has already saved much effort that was previously devoted to mechanical editing.

Uses specific example to document opinion.

File Management

The file-manager function allows the user to enter information and then to manipulate it quickly. During one three-day site visit, for example, a field engineer recorded a series of problems observed in the field. Then she rearranged the data to highlight specific points I asked her to study, such as I-beam welds and concrete cracks.

Gives simple explanation of how spreadsheet works.

Spreadsheet

Like the system's word-processing package, the spreadsheet is efficient and quickly learned. Because Best Choice is a multipurpose software package, spreadsheet data can be incorporated into letter or report format. In other words, spreadsheet information can be merged with our document format to create a final draft for submission to clients or supervisors, with a real savings in time. For example, the memo I sent you last week on budget projections for field equipment took me only an hour to complete; last quarter, the identical project took four hours.

Graphics

The graphics package permits visuals to be drawn from the data contained in the spreadsheet. For example, a pie chart that shows the breakdown of a project budget can be created easily by merging spreadsheet data with the graphics software. With visuals becoming such an important part of reports, we have used this feature of Best Choice quite frequently.

Shows relevance of graphics to current work.

User's Guide

Eight employees in my group have now used the Best Choice user's guide. All have found it well laid out and thorough. Perhaps the best indication of this fact is that in 30 days of daily use, we have placed only three calls to the Best Choice customer-service number.

Supplies strong supporting statistic.

CONCLUSION

Best Choice seems to contain just the right combination of tools to help us do our job, both in the field and in the office. These are the system's main benefits:

Wraps up report by restating main points.

- Versatility—it has diverse functions
- Simplicity—it is easy to master

The people in our group have been very pleased with the package during this 30-day trial. If you like, we would be glad to evaluate Best Choice for a longer period.

Offers follow-up effort.

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

Feasibility Studies

- Feasibility studies guide readers toward a particular action.
- It can be either in-house or external.
- Feasibility studies are usually solicited by the reader who needs to make a decision. Therefore, they do not advocate strongly for a single solution. Instead, they compare alternatives in such a way that a reader can make an informed decision about a course of action.
- Feasibility studies are often part of a larger process. They may be preceded by a problem analys and a recommendation report or proposal.
- Once a problem has been identified and analyzed and a response has been suggested, a feasibility study may be conducted to determine if the proposed action is appropriate for the particular situation in the organization. If the proposed action is feasible and desirable, the feasibility study may be followed by a plan of action, including the development of guidelines and training materials

Feasibility of Using Open-Source Software at M-Global

Uses formal document format appropriate for scope of project and length of report.

Prepared for:
Greg Bass, Director of Information Systems

Prepared by:
Kellen Holmes and Kate Newman

MEMO

To: Greg Bass
From: Kellen Holmes and Kate Newman
Date: April 20, 2012
Subject: Feasibility Report for Open-Source Software

Enclosed is the study that you requested of the feasibility of open-source software at M-Global. There are many options available to us, but we believe that some open-source software could meet our needs and save on license fees.

We should, however, be aware of the limitations of such software and of the different nature of technical support with this kind of software. We will not be able to turn to a vendor for technical support; instead, we will need to look to the community of users or create our own solutions. We believe that M-Global has the resources to support open-source software and even to contribute to the open-source software community.

We will be happy to meet with you to discuss our findings.

Explains context of the feasibility study.

Includes sources that are not cited in the report, but that may have provided useful background information.

Invites follow-up meeting.