

Part II: Chapter-by-Chapter Lecture Notes & Exercises

Chapter 2: Understanding the Writing Process and the Main Forms of Business Messages

Teaching Suggestions

Probably this material is covered best by lecture and discussion. But some writing could be assigned—especially of short, informal email messages. The longer messages are more appropriately handled in the following chapters that review them. What is particularly important is that students understand that good business writing is the result of careful planning, drafting, and revising. Sometimes students may be tempted to see the brevity of many business documents as indicative of the amount of time and effort that is needed to produce the document. Showing students the importance of planning and revising, in particular, will serve them well throughout their careers.

In addition, this chapter discusses forms of communication such as instant message, text messaging, and social networking that students are likely familiar with. However, students may realize how their use of these forms changes when they are in a professional setting. Providing contrasting examples, for instance, of a text sent to a business colleague and a text sent to a friend may be helpful. Students may also be encouraged to write the same message (e.g., a lunch invitation) to two different audiences, a friend and a client, so that they better see how context affects a message.

Note: For an additional class activity on Internet use in the workplace, you can have your class view the Manager's Hot Seat video "Privacy: Behind the Firewall?," which is about a workplace Internet policy.

Text Summary, Lecture Outline

Slides 2-1, 2-2, 2-3

You can point out that this chapter will cover advice that applies to writing all kinds of documents, as well as specific advice on the shorter forms of business communication, or "messages": letters, memos, email, text messages, and instant messaging.

The Process of Writing

Slide 2-4

You might ask students, before discussing this section, to reflect on (write about) their usual process of writing. (If they have trouble doing so, ask them to think about/describe how they tackled a recent writing task.) This exercise can help them see that this chapter contains helpful advice for them—advice that will make their writing more effective and the process itself less stressful.

The writing process diagram helps students see that the process of writing falls roughly into three stages:

- Planning,
- Drafting, and
- Revising.

But the arrows in the model also show that writers should allow themselves to revisit earlier stages as necessary (that is, allow the process to be recursive). To try to make the process rigidly linear is often counterproductive, especially for inexperienced writers.

As the text says, a good rule of thumb is to spend roughly a third of one's writing time on planning, a third on drafting, and a third on revising.

Slide 2-5

You can point out that the planning stage corresponds to the first three questions in the problem-solving approach represented in Chapter 1: What is the situation? What are some possible communication strategies? Which is the best course of action? To be able to answer these questions, the writer will perform these activities:

- Determining goals
- Analyzing the audience
- Gathering information
- Analyzing and organizing the information
- Choosing a form, channel, and format

Determining Goals: In determining goals, writers should ask themselves what a reader should think, feel, do, or believe as a result of reading a message. The writer's communication goals are very much connected, then, to the writer's business goals.

Audience Analysis: Analyzing the audience is key to any successful business message. Writers need to break down their audience by the audience's characteristics and then tailor a message to meet that audience's need. Writers will ask several questions: Who is my audience? Who will be affected by what I write? What organizational, professional, and personal issues or qualities will affect the audience's response to my message? What organizational, professional, and personal issues or qualities do I have that affect how I will write my message? What is my relationship with my reader? Am I writing to my superior? My colleagues? My subordinates? Clients?

Gathering information: Solving a communication problem can be viewed as part of solving a larger business problem. In other words, figuring out what to **say** often involves, as well, figuring out what to **do**. For example, in addition to going over the sample scenario provided in the text, you can ask your students the following: If, as a manager, you wanted to write an effective message to employees about leaving the parking spaces near the company's front door available for the customers, what things would you have to figure out before you could write this message? Students should come up with such topics as why the employees should do this, when they should start doing it, where they should park, any special incentive (or implied threat?!) that might encourage them to comply, and so forth. The point is that communicators usually cannot simply go with the information at the tops of their heads. They need to plan what goals they want to accomplish and then gather the ideas and information they will need in order to write the messages that will help them accomplish their goals.

Some activities that can help writers gather information include the following:

- Formal research (e.g., surveys, experiments, library research)
- Informal research (such as consulting with others, looking at previous messages for similar circumstances, and so forth)
- Listing pertinent ideas/information
- Brainstorming
- “Clustering” (drawing a diagram of your ideas)

Analyzing and organizing information. Once writers have collected what looks like sufficient information (though they may find later in the process that they need more), they need to analyze it and organize it.

Interpretation and logic help the writer determine what to say and in what order. Clearly, the message’s main points need to be based upon the gathered information, and they need to be arranged logically.

Adaptation is critical as well. Which comments in which order will be likely to have the best effect on the reader? The reader’s likely reaction will determine whether the message is written in the **direct** or **indirect** order and will also affect the order of the rest of the contents.

Choosing a form, channel, and format: In many textbooks, discussions of form, channel, and format are separate from the discussion about the writing process. But in reality, it is virtually impossible to plan a message without giving at least some preliminary thought to these elements. The medium is not just a container for the message; whether one anticipates writing a letter, email, brochure, Web page, or some combination of these, and how one anticipates they should look, will significantly affect the planning of the message.

Slide 2-6

As they draft, writers work out the content, stylistic, organizational, and formatting details.

As the text notes, writers should

- Avoid perfectionism when drafting
- Keep going (write things that suffice; come back later to improve them)
- Use any other helpful strategies (write during your most productive time; write in chunks, start with the part you most want to write, etc.)

You may want to share the following points with your students:

- It is very important that you are flexible when preparing your drafts. Drafts are the first stages of a long writing process. They are not final documents, so do not distract or slow yourself down too much by trying to make the first draft perfect.
- Instead, use strategies that will enable you to pull your material together fairly easily and quickly into a reasonably well-organized, complete draft.
- Avoid spending too much energy perfecting the early parts of the draft. It can make you forget important pieces and purposes of the later parts.
- Keep moving with your draft; have an understanding that you will draft relatively quickly, you can always go back and revise.

You may want to try the strategy discussed by writer Natalie Goldberg in *Writing Down the Bones*. It's called Keep Your Hand Moving and is good for breaking through perfectionism. You could give students a quick in-class business writing assignment, set a timer, and tell them that they cannot put down their pens or stop writing for 15 minutes. Even if they can think of nothing to say, tell them to write down "I have nothing to say." The idea here is to break through writer's block and keep the hand moving, regardless of the thoughts that arise.

Slide 2-7

It is probably safe to say that the most common flaw in students' writing processes is that they do not revise enough. Impress upon them the importance of devoting time to this stage. Even very experienced writers take a good bit of time to review and polish important documents. Taking a "levels of edit" approach can help students revise in a systematic way. With this approach, the writer divides the revision stage into three activities:

- Revising (making any necessary major changes in the document, such as adding more contents, improving the organization, or changing the format)
- Editing (perfecting the style and flow of the message)
- Proofreading (catching any spelling/typing/grammatical errors)

Slide 2-8

Readable formatting is hugely important in business writing. Business readers are almost always very busy and are therefore impatient. And modern media has trained us in general to expect and prefer quick access to information. Any documents that come close to looking like the bad example on page 121 will run a risk of being misunderstood or, more likely, ignored.

Use the good example on page 122 to help students see how white space, headings, typographical emphasis (boldface and italics), and bulleted lists can enhance readability.

Slide 2-9

There are many different types of business messages and each has its own unique traits and purpose. As you'll see, every business communication situation requires analysis to determine which type of message will be used.

Letters

Slides 2-10, 2-11

These are the oldest form dating from the earliest civilizations—Greek, Egyptian, Chinese.

The genre implies a certain formality, and certainly, letters are the most formal of the business writing forms we discuss. Therefore, letters are usually written to external audiences—but not always. Formal internal communication is also frequently written in letter format.

Students may already be familiar with some kind of letter format. If not, students should see Appendix B to see the possibilities available. Many times students will ask which format is the “right” one. It’s important for students to realize that any could be correct but that their companies may dictate format. Early emphasis was on a stilted word choice (the “old language of business”). Now the emphasis is on selecting an effective structure and strategy and on using wording that will build rapport between the writer and the reader. You may want to ask students to bring in direct mail letters or another type of letter for analysis during this class or the next.

Memorandums

Slides 2-12, 2-13

Memorandums are internal letters. Email has taken over much of their function; however, even though students may think that everyone in a workplace has access to an email, this may not necessarily be the case. For example, in one local hospital, housekeepers, custodial staff, nursing assistants, and some nurses do not have access to email other than in a lounge with a general access computer. In some manufacturing firms, line workers may not have the need for email. These employees are not likely to check their email as they work throughout the day or even regularly before or after work or on breaks.

A memo posted in a highly visible location would be a better communication channel for these employees than email. In addition, some memos are actually reports.

Also, some companies will consider more serious information, such as that concerning changes in company policies or recent layoffs, more appropriate for memo than email form.

Typically they are arranged in this form:

- “Memorandum” or “Interoffice Memo” at the top.
- Date, To, From, Subject headings
- (Sometimes) Department, Territory, Store Number, Copies to

They vary widely in terms of formality, but because they are internal messages, they are generally less formal than letters.

Email

Slide 2-14

The growth of email has been phenomenal. It has several advantages:

- Eliminates telephone tag
- Saves time
- Speeds up decision making
- Is cheap
- Provides a written record

But there are disadvantages:

- Not confidential
- No authentic signature
- Doesn't show emotions
- May be ignored

Slide 2-15

The prefatory elements and beginnings are somewhat standardized:

- To, Cc, Bcc, Subject, Attachments
- Subject lines: These are very important in emails. If a subject line is missing or if it is incomplete, a reader may disregard the message or delay a response.
- Name of recipient, perhaps a greeting, statement of purpose
- Identifying information: Identify yourself early when communicating with someone you don't know well.

Slide 2-16

Content should be organized carefully.

Short, simple messages usually are best in a top-down order (most important to least important). This way, if the reader is scanning for information, he or she does not need to scroll to find your most important information.

The longer, more complex messages use more strategic organization plans such as the direct or indirect order discussed in Chapters 6 and 7.

Slide 2-17

As for closing the message, most emails end with the writer's name alone (if the parties know each other). Many writers create an email signature that includes not only of their name but also the company name and contact information. Such a signature really is appropriate only for external audiences or unfamiliar internal audiences.

Sometimes one may find it appropriate to include a complimentary close ("Sincerely," "Thanks").

The formality of the closing depends on the formality of the message and the relationship between the reader and the writer.

Slide 2-18

The formality of email language depends on the relationship between writer and reader.

Casual language is acceptable between friends. It uses contractions, slang, mechanical emphasis devices, and everyday conversational talk.

Informal language is right for most messages. It uses short sentences, some contractions and personal pronouns, and good conversational tone.

Slide 2-19

Formal language maintains a distance between writer and reader—no personal references.

Slide 2-20

The writing of email messages involves following the instructions given in previous chapters. These can be summarized under four considerations:

Conciseness

Make the messages short, leaving out unnecessary information and writing economically.

Clarity

Practice the techniques of readable writing—short and familiar words, concrete language, word precision, short sentences, etc.

Courtesy

Practice courtesy, build goodwill (use the techniques in Chapter 4: you-viewpoint, positive language, conversational tone, etc.).

Especially avoid “flaming.”

Correctness

How one communicates is a part of the message. Even if the writer uses poor grammar and spelling and succeeds in communicating his/her message, the writer compromises his/her professional image when a message contains grammar, spelling, and mechanical errors.

Further, errors in grammar, mechanics, and spelling can make a message unclear, which means that the reader will have to contact the writer for clarification. This means that the writer will have to send the message again, which wastes both the writer’s and the reader’s time.

Slides 2-21 and 2-22

Email is a sensitive medium and its quick execution and delivery time leave it open to errors. Because it's informal and still being defined as a genre, it's vulnerable to etiquette errors. These slides illustrate how to avoid such errors.

Texts and IM

Slides 2-23, 2-24, 2-25, 2-26 and 2-27

Many individuals use text and instant messaging in the workplace as a quick and efficient means of communication. When using such short messages, writers must be especially careful to ensure messages are not only concise but clear. A helpful activity may be to have students write one message in two ways: once as an email and once as an instant message.

Text and instant messaging are still used much more for non-business rather than business purposes.

But it is seeing growing use in business use—for quick “emails” to co-workers, promotions, brand awareness, customer relations, and such. Clearly, as the so-called “millennials” join the workforce, use of text messaging will increase.

Slide 2-28, 2-29 and 2-30

Social networking (which is, of course, popular for personal use) is also becoming more popular for business use. Companies use social networking for both internal and external purposes. Students must know that companies can monitor their social networking use in the workplace. Companies may seek out students' pages even before employing them just to see what their (the students) pages reveal about their (the students') personalities.

Slide 2-31

There are significant differences between print and online writing. Jakob Nielsen, noted usability expert, has discovered these distinctions:

- Web readers read an average of 20 percent of the words on a page.
- Print text can be distinguished from Web text in that print text tends to be linear, while Web text is nonlinear. When people read print documents, they often start at the beginning and continue reading until they reach the end.
- Online readers scan for relevant information and may be diverted by links or other features of the display in their search.
- In addition, he says that when people look for information they do so not necessarily to read what an author has to say about an issue but to accomplish a specific task (e.g., locate a statistic, fill out a form). Online text, then, needs to facilitate the reader's ability to find and use information.

Slide 2-32

Web writing expert Janice Redish advocates organizing Web pages in the inverted pyramid style, where the main point is presented first, followed by supporting information and then by any historical or background information.

Critical Thinking Questions

1. **Identify and explain the steps in the writing process. (LO1)**

See pages 22 – 28 in the text.

2. **Think about a writing project that you recently completed. Using the terminology in this chapter, describe the process that you used. How might using different strategies have made the project more pleasant and productive? What helpful strategies did you use, if any, that were not mentioned in this chapter? (LO1)**

Evaluate each student's answer in terms of its use of terminology and its detail.

3. **Think about a letter you received or wrote recently, and explain why it was appropriate to use a letter in this situation. (LO2)**

Most students will think of a letter they received from or wrote to an external audience (insurance company, sales letter, etc.), but some may cite formal letters from internal parties (for example, a letter from the university president to the student body, or an official letter of promotion, congratulations, dismissal, or reprimand inside an organization).

4. **Will hard-copy letters and memos diminish in importance given the prevalence of email in the workplace? Become obsolete? Vanish? (LO3)**

Of course, no one really knows the answer. Letters and memos may diminish in importance, but they won't vanish, because they meet a need for formal internal and external correspondence that email seems too casual for. A trend some have noticed, though, is that the electronic delivery of letters as email attachments has increased.

5. **Discuss the reasons for social networking's phenomenal growth. Do you use social media for business purposes? If so, how? Describe what works well and what does not. (LO6)**

Social networking has advantages over other forms of communication. It is fast, convenient, time-saving, efficient, and effective. What will be interesting is to see how parameters are defined for use in professional settings. Also interesting will be the extent to which individuals' personal and private lives intersect and the legal ramifications thereof.

Students' answers regarding their use of social media for business purposes will vary. Business purposes may include publishing an official Facebook business page, publishing a blog to showcase professional expertise, and networking on LinkedIn and Facebook.

6. **Why should business writers be concerned about grammar and spelling in their email communication, even with audiences they know? (LO4)**

Using incorrect spelling and grammar can convey an appearance of sloppiness or ignorance. It can also impede clear communication.

7. **Some authorities say that shortcuts in text messaging and instant messaging will lead to users' inability to spell properly in more formal contexts. Do you agree? (LO5)**

There are credible arguments for both sides of this issue. One argument is that text and IM-speak are causing a breakdown of the English language. The other argument is that they are providing opportunities for students to gain more writing experience and are exciting examples of the evolution of language. Obviously, both sides have merit.

8. **Letters, memorandums, and email messages can differ more than in their physical make up. Explain and discuss. (LO2–LO4)**

As letters are the oldest message form, their formats have developed over centuries of use. Thus they have become standardized. Memorandums also have a somewhat standardized format, but it is often changed to fit the needs of the individual business (department designations, store or plant locations, copies to, etc.). Email format is sort of a hybrid between letter and memo format.

9. **Discuss and justify the wide range of formality used in memos and email messages. (LO3, LO4)**

Both email messages and memorandums serve the communication needs of business, and these needs exist at all levels of the organization. Internal messages are sent to the highest levels of management and the lowest levels of employees. And these messages range from the most formal documents to the informal notes exchanged between workers. The level of formality in an internal memo or email will depend on the relationship between the writer and the reader and on the nature of the message.

10. **What factors might determine whether or not instant messaging would be an appropriate medium to use in a given situation? (LO5)**

Your students might cite its appropriateness to the organization's culture, the availability of the technology, the likelihood of the intended IM-ing partners being online when you are, the formality of the situation.

Critical Thinking Questions

1. **Interview a working professional about his or her writing process. In addition to asking about general strategies for different kinds of writing, ask how he or she tackled a particularly difficult writing situation. Write the results of your findings in a brief memo report to your instructor. (LO1)**

Individual answers will vary.

2. **Find a sample of business writing and evaluate its use of formatting elements. If they are effective, say why; if not, explain what you would do differently. (LO1)**

Individual answers will vary.

3. **Using various formatting devices, turn the following contents into a readable, attractive flyer, brochure, or email announcing a health club's new rates for employees of a nearby hospital. (You may want to consult Bonus Chapter A's advice on formatting.) (LO1, LO3)**

New Special Rates for Metropolitan Hospital Staff!

The Health Club is now offering special rates for all Metropolitan Hospital employees. The Club is a full-service exercise club located at 42 Adams Street, just across from the hospital. Our facilities may be a good option for Metropolitan employees to explore. We offer the following membership types for Metropolitan employees or retirees: Single Standard, 1 year prepaid (\$200/year); Single Standard, by the month (\$15/month plus a onetime \$50 enrollment fee); Single Deluxe, 1 year prepaid (\$300/year). Single Deluxe includes your personal locker and a towel service. Metropolitan employees' spouses or domestic partners are eligible for a 20 percent discount on the Club's normal rates. You can take a tour, join the Club, or ask any questions by calling 555-5555. We have a large free-weight room; new Cybex (Nautilus-style) machines; ellipticals, treadmills, bikes, steppers, and rowers; an Olympic-size swimming pool; aerobics, Pilates, and yoga classes; racquetball and handball courts; a large gym/basketball court; a whirlpool; a steam room and saunas; shower and locker room facilities; and free parking. A small fee for some classes may apply. Our hours are Monday through Friday, 5 AM to 10 PM; Saturday, 7 AM to 8 PM; and Sunday, 7 AM to 6 PM. Our website address is www.healthclubin.org.

Though individuals' answers will vary, students may be encouraged to think of the journalist's 5 Ws (who, what, where, when, why) and 1 H (how) process for determining relevant information. In addition students should think about visual appeal and logical order of the information. For a more extensive exercise, students may want to expand their skills and create a flyer in a design program such as Publisher.

4. **Instructions: Write a text message shorter than 160 characters for each of the cases below. Be sure your message is both clear and complete. (LO5)**
 - a. **You own three coffee shops around your area. Although you have a loyal base of regular customers, you realize that there is both room to grow this base and a real need to compete with the growing presence of Starbucks and other competitors. Your coffee is good and reasonably priced, but seasonal fruit and muffins have long been your specialties. In fact, since the local television station included your shop in a healthy eating segment, your low-fat muffins have been selling out every day even though you have been increasing production. When some of your loyal customers started grumbling about not always being able to get them, you knew you wanted to**

serve your customers better. Because most of them have mobile phones, text messaging seems like an obvious solution. You have decided to offer an opt-in polling service that would ask their preference for a particular low-fat muffin or fresh fruit. Your customers could select the days of the week they would be interested in getting the poll. Although they would not be placing an order, they would be helping you plan. You'll also be spending well-targeted promotion dollars while creating goodwill with your loyal customers. Now you need to write this poll question.

Coffee House's daily poll: 1) fat-free bran, 2) fat-free blueberry, 3) fresh strawberries and pineapple. (108 characters with spaces) Students may be tempted to include a lot of information, but they only need to compose the poll question.

- b. You are on your way to the airport for a trip to a weeklong conference when you remember a file you were supposed to send to a customer. So many last-minute details came up that you really don't remember if you sent it. Unfortunately, you cannot access your work computer from outside the company firewall, but you have a colleague, Chris VanLerBerghe, who would be able to check your email outbox to confirm whether or not you sent it. Chris could also send the file, if necessary. However, you cannot reach her by phone now because she is in an important planning meeting, so you decide to send a text message with the exact information she will need to help you out. Be sure your message is both clear and complete.**

Please check my email outbox. Confirm the report.doc file was sent to Robert Smith this a.m. If not sent, send the file to him today. (136 characters with spaces)

- c. As you are in the morning sales meeting, your mobile phone vibrates, indicating that you have an incoming call. You recognize the source—Yesaya Chan, the high school student you are mentoring/tutoring in math. When you are finally able to listen to the call, you learn that Yesaya needs your help tonight because his teacher moved a test up a couple of days. He wants to know if you can meet him at the local library at 5 pm, noting that it will be open late tonight. You will say yes, but the earliest you can be there on such short notice is 6 pm. Suggest that he still go to the library at 5 pm and work as many of the review problems on his own as he can. You will help him with the others when you get there. Because he is probably in class now, you will send your response as a text message so it won't interrupt his class.**

I can meet at 6. Go to the library at 5 and work on review problems until I arrive. (86 characters with spaces)

- 5. Assume the role of the hotel manager we discussed in the "Planning the Message" section of this chapter. The air conditioning has stopped functioning on one of the busiest and hottest weekends of the year. You need to explain the situation and what you are going to do (or have done) about it to three audiences: your guests, your co-workers who will be helping you solve the problem, and your boss, who will not be at the hotel until Monday. Develop a plan for the message you will send to each of these audiences in which you**

follow the five steps discussed in this chapter for planning a message. Be sure you consider your goal in communicating with each audience, the format/ channel your communication will take, the content each audience will need, and the tone and style that will be appropriate for each audience. (LO1)

Answers will vary but should reflect all stages of the planning process.

6. **You work as a marketing director for a national chain of clothing stores specializing in professional wear for men and women. You think it would be a great idea to run daily specials and advertise them on Twitter, Facebook, and email. However, when you take your idea to the weekly management meeting, some question what these advertisements would look like. Using what you've learned about planning messages, writing email, and communicating through social media, write a sample message for each medium. How long will your messages be? What type of content will you include? What will you say in one medium that you might not say in another? What might be the advantages of one medium over another? (LO1, LO3, LO5, LO6, LO7)**

Though individual answers will vary, student should keep Facebook messages and Twitters posts to a maximum of 140 characters, and email to no more than 300 words. The email subject line and email body, and Facebook and Twitter posts should sell the specials.

7. **You work as a developer for a software company. You're writing an announcement to all company employees reminding everyone of an all-hands meeting tomorrow. The announcement will be posted on the company intranet, which employees know to check multiple times per day, as that's your company's preferred mode of internal communication. The purpose of the meeting is to make sure everyone is ready for the go-live of your software at a local clinic. It's really important that every- one knows how to document any support calls from the clinic and the protocol for prioritizing calls for service- not that you're expecting difficulties; you just want to make sure your support for the clinic is organized and orderly. Use the inverted pyramid approach to organize your message. (LO1, LO7)**

Students' answers may vary but should take a form similar to this example:

IMPORTANT REMINDER

To: All Employees

Re: Mandatory Meeting Tomorrow, (date)

In order to be ready for the go-live of (name of software) at the (name) Clinic, all employees must be present at the meeting tomorrow to learn the proper procedure for documenting support calls and prioritizing service calls received from the clinic, should they arise.

We expect the software launch to be successful, however all employees need to be prepared to provide organized and orderly service to our client. Thank you for your participation.