**PREPARING EFFECTIVE BUSINESS DOCUMENTS**

**Business Letters/Memoranda/E-mail:**

Letters/memoranda/e-mail/ reports should be recipient – based rather than simply writer-based.

**Three step process:**

***Pre-writing***

Four key questions are imperative:

1. What is my purpose?
2. Who is my audience?
3. What should I say about the subject?
4. What action or response do I want from the recipient?

***Writing***

Prepare a rough draft. Don’t worry about phrasing, grammar, spelling etc.

***Revising***

Read over your rough draft and organize your sentences to achieve a logical flow. Check for grammar, facts, spelling, tone etc. Proofread your final copy.

**STRIKE THE RIGHT TONE**

Tone assists the writer to adapt letters to different occasions and different readers. Tone refers to the emotional content of your letters. Eg. Formal, informal, negative, positive, argumentative and humorous.

**BE SINCERE**

Avoid insults and flattery.

**KEEP IT POSITIVE**

**Tone of Business Writing**

* should convey interest in the recipient.
* Don’t go to extreme and get “too familiar” – find a middle ground, cordial but dignified.
* In short, write letters you would like to receive.

**Exercise Tact**

* 1. Part of creating proper tone
  2. Important especially when answering angry customers
  3. Never write letter for which you will have to apologise

**Activity 1**

**In each of the following sentences, identify the word(s) or phrase(s) which could offend the reader/recipient.**

1. Your complaint about the damaged shipment will receive our careful attention.
2. This corrects the mistake you made in the amount of the cheque due us.
3. Due to production problems, we cannot ship your order before October 1.
4. We simply don’t understand your failure to pay this bill.
5. Until we see the specifications, we cannot quote you a price.
6. In your letter, you claim we miscalculated the price.
7. You certainly should know we did not offer you any such concession.
8. In every sales force like ours there are leaders and there are plodders.

**Activity 2**

***Rewrite the following using a more appropriate tone:***

**(A)**

Dear Mrs. Wakefield,

I noticed that I was not paid honorarium that I had worked so hard for last month. When is the Finance Unit going to make that payment, as I am in need of the money to take care of some urgent transactions.

Sincerely,

Thomas Brown

**(B)**

**Rewrite the following in memorandum format**.

Miss Stanley, it seems to me that my request over three weeks ago to view my personal file is a difficult one. Please let me know what is happening.

**(C)**

Dear Mr. Green,

We received your request for a 20% discount on future orders, considered it, even asked our President, but we can’t grant it. How about 1%?

Yours sincerely,

Dujon Nice

Marketing Manager

**Guidelines for Writing Letters**

**Business Letter Format:**

* **Address**
* **Date**
* **Salutation/Greetings**
* **Body of Letter**

**-First Paragraph should state the purpose for writing**

**- In the following paragraphs, provide more information and specific details**

**-last paragraph, you can reiterate the purpose, ask for a specific response, indicate timeline**

* **Closing**
* **Signature**

***Writing Business Letters:***

1. State clearly all the necessary information
2. State the purpose of your letter at the beginning; then make sure that the rest of your letter is related to that purpose.
3. Write using clear, complete sentences. Remember Business English is Standard English. Avoid abrupt, old-fashioned, or unnecessary expressions.
4. Invite prompt consideration and cooperation by being courteous and friendly.
5. Keep business letters impersonal (except letter of application). Limit the use of I and me. Business letters can be friendly in tone without being personal.
6. Make your letters attractive. Use good stationery and write/type letters with care.
7. Proofread carefully. If you make mistakes, rewrite/retype

***Letters of Complaint:***

1. Write promptly
2. Give exact and complete information
3. Be courteous
4. Make sure your complaint is justified and that the adjustment you request is reasonable.

**Writing E-mail**

**Tips:**

* Think before you write
* Keep your messages concise
* E-mail is not necessarily confidential
* Don’t spam your readers-unnecessary messages
* Don’t type in all caps
* Don’t type in all lower case
* Use the subject line to get your reader’s attention
* Proofread your mail before you send it

**Writing Memoranda**

***Memorandum-something that should be remembered or kept in mind.***

* Memoranda do not require a salutation or a closure as business letters.
* Length varies-generally short: not more than two pages.

**Sample Memo Format/Template**

**To:**

**From:**

**Date:**

**Subject:**

**First Sentence/Segment:**

Reason for writing the Memo

**Second Sentence/Segment: Main Body**

Any Instruction or information, etc

**Closing Sentence:**

What is required of the reader, Eg. confirmation, approval, feedback.

**REPORT WRITING**

***REPORT STRUCTURE/OUTLINE***

This checklist presents general guidelines for report structure/outline. Keep in mind that formatting conventions may vary depending on the particular writing context. For example, in some report formats, the conclusions are placed at the beginning rather than the end. The best advice is to consider your particular writing context carefully and to let it guide your writing. If you are writing in a workplace context, find out if your organization has document or style guidelines and look at previous reports done by the organization. Whenever you write, you should keep your purpose and audience clearly in focus. Begin by considering:

* What do you want to accomplish with your report- what are your primary and secondary objectives?
* Who will be reading your report and for what purposes: What is their background? What questions might they have? What might they expect in terms of content and format?

The beginning contains the introduction, the terms of reference, methodology and executive summary.

The middle is the core of the document and contains the report’s message. This is where the evidence and findings are presented and analysed, the main arguments are developed and the reader’s interest, aroused earlier, is sustained.

The end contains the conclusions. (It explains them, how they were arrived at), lists recommendations for further actions. It also contains an appendix of supporting documents.

***Introducing the Report***

* It sets the scene for the reader and puts the terms of reference into context
* May seek to explain company policies
* Methodology – a detailed description of the approach adopted. It explains how the subject will be tackled and how the information will be presented.
* Objectives – explain the reason for writing the report, set out the scope and the intended outcomes.
* Background information – may be included in the introduction to explain why the report was written.

***Methodology***

* Collect the necessary and relevant data using methods such as: interviews, consulting experts, examining documents, reports, visual observation of procedures and practice, surveys, questionnaires etc.
* Qualitative and quantitative data
* Primary and secondary data

***Data Presentation (Evidence)***

* Arrange and present information using tables, graphs, charts etc
* Present responses from interviews

**Analysis/Discussion**

Anticipate objections to the arguments being advanced, and be prepared to meet them head on.

* Tackle issues systematically to maintain reader interest
* Provide proof at appropriate points – data etc.
* Develop arguments carefully and logically and move steadily towards your conclusion.

**Conclusions:**

Before considering what conclusions to draw, check again the quality of your data:

* Compare and cross – check the information you have gathered and the reliability
* Re-examine the Terms of Reference and ensure each point has been fully addressed.
* Compare findings with those of previous studies to avoid inconsistency.
* Check that the findings logically point to the conclusions. Consider whether any alternative rational explanations fit the facts and evaluate answers
* Consider whether you may have employed biased methodology. Examine all the assumptions you have made. Do not let personal values and beliefs colour your judgment.

**Recommendations**

* Should be specific and clear
* Identify how a particular problem can be solved
* Have they emerged logically from the conclusions?
* Are they consistent with the Terms of Reference?
* Do they link with the main part of the report?
* Can they be justified?
* Have you listed each recommendation separately and numbered them clearly?

**Appendices**

* It is the reference section of a report
* Can include detailed statistical data, graphs, tables, working mathematical examples, source documents or relevant correspondence
* Attention should be drawn to the appendices at the appropriate point in the text

**Report Structures**

**Examples:**

**Short Report**

* Title Page
* Introduction
* Discussions
* Recommendations
* References

**Science Report**

* Title Page
* Introduction
* Methods &Materials
* Results
* Discussion
* Conclusion
* Appendices
* References

**Research Report**

* Title Page
* Executive Summary
* Introduction
* Methodology
* Results Findings
* Discussion
* Conclusions
* Recommendations
* Appendices
* Biblography

**Business Report**

* Title Page
* Executive Summary
* Table of Contents
* Introduction
* Discussion
* Conclusion
* Recommendations
* Appendices
* References