GLOBAL EDITION

# Business Communication Essentials

SEVENTH EDITION

Courtland L. Bovée • John V. Thill

ALWAYS LEARNING

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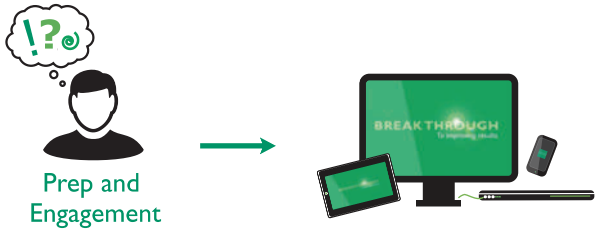
# MyBCommLab®: Improves Student Engagement Before, During, and After Class




- **Video exercises** – engaging videos that bring business concepts to life and explore business topics related to the theory students are learning in class. Quizzes then assess students' comprehension of the concepts covered in each video.

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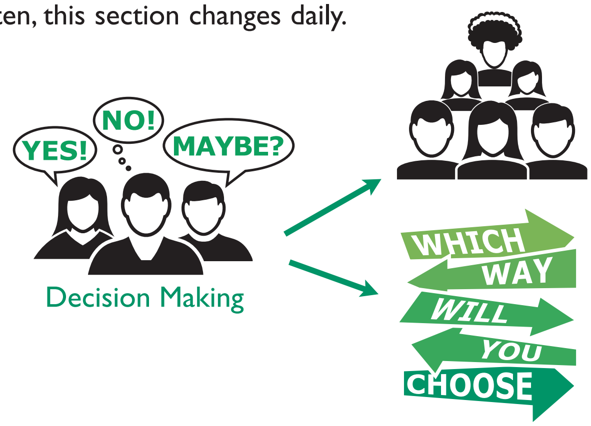


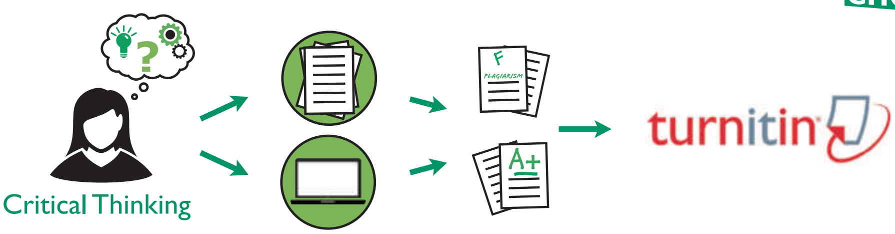


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- **Additional Features** – included with the MyLab are a powerful homework and test manager, robust gradebook tracking, comprehensive online course content, and easily scalable and shareable content.

# Today's students are holding the future of business communication in their hands

As another disruptive technology redefines business communication, Bovée and Thill are once again the first to respond with current, comprehensive, and fully integrated coverage.

Just as Bovée and Thill pioneered coverage of the social media revolution, they now lead the market with up-to-the-minute coverage of mobile business communication.

"Mobile is the most disruptive technology that I have seen in 48 years in Silicon Valley."[1]

—Venture capitalist Joe Schoendorf

## The mobile revolution: key facts and figures

Smart business leaders know they must adapt and respond to the rise of mobile usage by consumers and employees:[2]

**REAL-TIME UPDATES**

LEARN MORE BY VISITING THIS WEBSITE

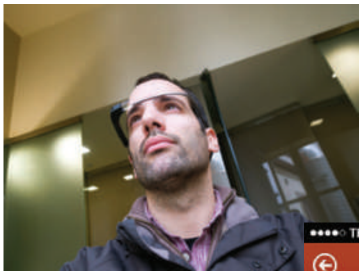
**The mobile revolution by the numbers**

Explore dozens of statistical measures that show the impact of mobile communication. Go to **http://real-timeupdates.com/bce7**. Under "Students," click on "Learn More."

- For millions of people, a mobile device is their primary way, if not their only way, to access the Internet.
- Globally, 80 percent of Internet users access the web at least some of the time with a mobile device.
- Mobile has become the primary communication tool for many business professionals, including a majority of executives under age 40.
- Email and web browsing rank first and second in terms of the most common nonvoice uses of smartphones.
- More email messages are now opened on mobile devices than on PCs.
- Roughly half of U.S. consumers use a mobile device exclusively for their online search needs.
- Many online activities that eventually migrate to a PC screen start out on a mobile screen.

**Bovée and Thill's coverage of mobile business communication includes these important topics:**

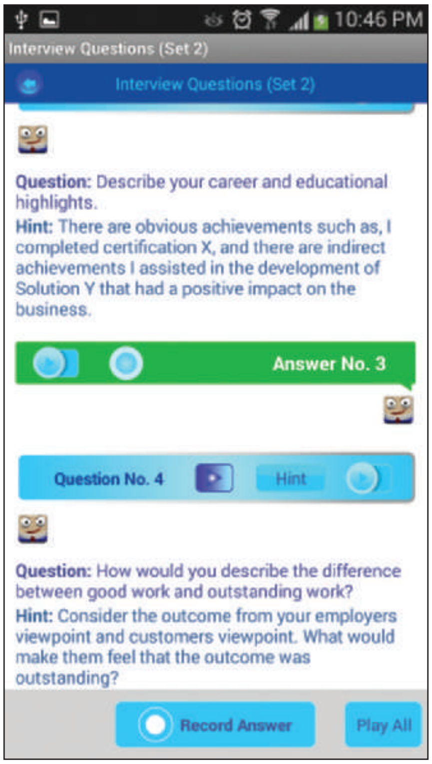
- *The Mobile Revolution*
- *The Rise of Mobile as a Communication Platform*
- *How Mobile Technologies Are Changing Business Communication*
- *Collaboration via Mobile Devices*
- *Business Etiquette Using Mobile Devices*
- *The Unique Challenges of Communication on Mobile Devices*
- *Writing Messages for Mobile Devices*
- *Designing Messages for Mobile Devices*
- *Optimizing Content for Mobile Devices*
- *Visual Media on Mobile Devices*
- *Creating Promotional Messages for Mobile Devices*
- *Integrating Mobile Devices in Presentations*



# Integrated coverage and student activities

As with social media, the changes brought about by mobile run far deeper than the technology itself. Successful communication on mobile devices requires a new approach to planning, writing, and designing messages.

With in-depth, integrated coverage of the challenges and opportunities that mobile presents, *Business Communication Essentials,* 7th Edition, helps students adapt their personal use of mobile devices to the unique demands of business communication. Through a variety of annotated model messages, questions, activities, and cases, students will gain valuable skills in the art of communicating via mobile devices.




**EMAIL SKILLS/MOBILE SKILLS**

**6-30. Media Skills: Email [LO-4]** The size limitations of smartphone screens call for a different approach to writing (see page 141) and formatting (see page 162) documents.

**Your task:** On the website of any company that interests you, find a news release (some companies refer to them as *press releases*) that announces the … other writing app at … in a way that would …

**PRESENTATION SKILLS/MOBILE SKILLS**

**12-23. Presentations: Designing Presentation Visuals; Mobile Media [LO-4]** On SlideShare or any other source, find a business presentation on any topic that interests you.

**Your task:** Re-create the first five slides in the presentation in a manner that will make them more mobile-friendly. Create as many additional slides as you need.

*With realistic examples, pointers to dozens of business communication apps, and a full range of questions and projects, Business Communication Essentials highlights the best current practices in mobile business communication.*

**MOBILE APPS**

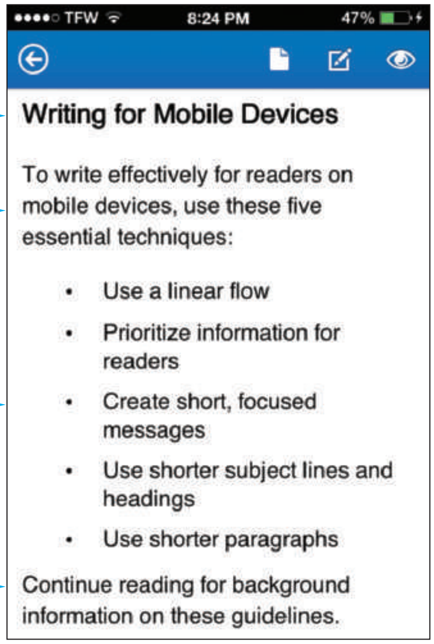
Pocket Letter Pro includes templates for a variety of letter types to simplify writing business letters on your mobile device.

Optimizing for mobile includes writing short headlines that get right to the point.

This introduction conveys only the information readers need in order to grasp the scope of the article.

All the key points of the documents appear here on the first screen.

Readers who want more detail can swipe down for background information on the five points.




1. "The Mobile Revolution Is Just Beginning," press release, Word Economic Forum, 13 September 2013, www.weforum.org.

2. "More Than Nine in 10 Internet Users Will Go Online via Phone," eMarketer, 6 January 2014, www.emarketer.com; Christina "CK" Kerley, *The Mobile Revolution & B2B*, white paper, 2011, www.b2bmobilerevolution.com; Jordie can Rijn, "The Ultimate Mobile Email Statistics Overview," Emailmonday.com, accessed 9 February 2014, www.emailmonday.com; Jessica Lee, "46% of Searchers Now Use Mobile Exclusively to Research [Study]," Search Engine Watch, 1 May 2013, http://searchenginewatch.com.

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SEVENTH EDITION

GLOBAL EDITION

# Business Communication Essentials


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*Authorized adaptation from the United States edition, entitled Business Communication Essentials, 8th edition, ISBN 978-0-13-389678-7, by Courtland L. Bovée and John V. Thill, published by Pearson Education © 2016.*



ISBN 10: 1-292-09326-9
ISBN 13: 978-1-292-09326-0

British Library Cataloguing-in-Publication Data
A catalogue record for this book is available from the British Library.

10 9 8 7 6 5 4 3 2 1
14 13 12 11 10

Typeset in 10.5/12 Minion by S4Carlisle Publishing Services.

Printed and bound by CTPS China.

# Contents in Brief

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# Real-Time Updates—Learn More

*Real-Time Updates—Learn More* is a unique feature you will see strategically located throughout the text, connecting you with dozens of carefully selected online media items. These elements—categorized by the icons shown below representing interactive websites, online videos, infographics, PowerPoint presentations, podcasts, PDF files, and articles—complement the text's coverage by providing contemporary examples and valuable insights from successful professionals.

**REAL-TIME UPDATES**

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**LEARN MORE BY LISTENING TO THIS PODCAST**



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**REAL-TIME UPDATES**

LEARN MORE BY READING THIS INFOGRAPHIC

# Preface

## Major Changes and Improvements in This Edition

Here are the major changes in the Seventh Edition of *Business Communication Essentials*:

- Groundbreaking coverage of mobile business communication; please see the next page for more information
- New text sections:
  Using All the Job-Search Tools at Your Disposal (Prologue)
  The Mobile Revolution (Chapter 1)
    The Rise of Mobile as a Communication Platform
    How Mobile Technologies Are Changing Business Communication
  Collaboration via Mobile Devices (Chapter 2)
  Putting Meeting Results to Productive Use (Chapter 2)
  Business Etiquette Using Mobile Devices (Chapter 2)
  Selecting the Best Combination of Media and Channels (Chapter 3)
  The Unique Challenges of Communication on Mobile Devices (Chapter 3)
  Writing Messages for Mobile Devices (Chapter 4)
  Designing Messages for Mobile Devices (Chapter 5)
  Optimizing Content for Mobile Devices (Chapter 6)
  Creating Promotional Messages for Mobile Devices (Chapter 9)
  Organizing a Presentation (Chapter 12)
  Integrating Mobile Devices in Presentations (Chapter 12)
  Choosing a Design Strategy for Your Résumé (Chapter 13)
- Coverage of emerging issues that are reshaping business communication, including *digital information fluency* and the *bring your own device (BYOD)* phenomenon
- Coverage of *linear* and *nonlinear presentations*, discussing the relative strengths of slide-based presentations (linear) and Prezi-style presentations (nonlinear)
- Revised treatment of media and channels; to reflect the continuing evolution of digital formats, we now categorize media choices as *oral, written*, and *visual,* each of which can be delivered through *digital* and *nondigital channels* to create six basic combinations
- More than 40 new business communication examples and figures—and the illustration portfolio for the Seventh Edition includes more than two dozen mobile communication examples and more than two dozen social media examples
- New exercises and activities that focus on mobile communication
- A selection of communication cases that challenge students to craft messages for mobile devices; overall, more than 30 percent of the cases are new in this edition

## As Another Disruptive Technology Transforms Business Communication, Bovée and Thill Again Lead the Field with Innovative Coverage

The history of business communication over the past couple of decades has been one of almost constant change. The first major wave was the digital revolution, replacing much of the print communication of the past with email, instant messaging, web content, and other new forms. Then came social media, which fundamentally redefined the relationship between businesses and their stakeholders. And now comes the third wave, and it's proving to be every bit as disruptive—and full of exciting possibilities—as the first two.

Mobile communication, and mobile connectivity in the larger sense, is changing the way business communicators plan, create, and distribute messages. Mobile devices are overtaking PCs as the primary digital communication tool for millions of consumers, employees, and executives, and businesses that don't get mobile-friendly in a hurry will fall behind.

For business communicators, the shift to mobile involves much more than the constraints of small screens and new input technologies. The ability to reach people anywhere at any time can be a huge advantage, but the mobile communication experience can also be a major challenge for senders and receivers alike. It requires new ways of thinking about information, message structures, and writing styles. With the notion of *radical connectivity* (see page 57), for example, many communication experiences are no longer about "batch processing" large, self-contained documents. Instead, communication is taking on the feel of an endless conversation, with recipients picking up smaller bits of information as needed, in real time, from multiple sources.

The fundamental skills of writing, listening, presenting, and so on will always be essential, of course, but those skills must be executed in a contemporary business context. That's why Bovée and Thill texts carefully blend technology awareness and skills with basic communication skills and practices. The new coverage of mobile communication is deeply integrated throughout the Seventh Edition, with major new sections in many chapters and important updates in other places, along with a variety of new questions, activities, and cases.

Welcome to the wild new world of mobile business communication!

## Why Business Communication Instructors Continue to Choose Bovée and Thill

- **Market-leading innovation.** The unique new coverage of mobile communication in this edition is just one example of how for more than three decades, Bovée and Thill texts have pioneered coverage of emerging trends and their implications for business communication. They were the first authors in the field to give in-depth coverage to digital media, then social media, and now mobile communication.
- **Up-to-date coverage that reflects today's business communication practices and employer expectations.** Technology, globalization, and other forces have dramatically changed the practice of business communication in recent years, even to the point of altering how people read and how messages should be constructed. To prepare students for today's workplace, the business communication course needs to address contemporary skills, issues, and concepts.
- **Practical advice informed by deep experience.** Beyond the research and presentation of new ideas and tools, Bovée and Thill are among the most active and widely followed users of social media in the entire field of business communication. They don't just write about new concepts; they have years of hands-on experience with social media, blogging, content curation, search technologies, and other important tools. They are active participants in more than 45 social media sites.


- **Engaging coverage of real companies and contemporary issues in business communication.** Bovée and Thill texts emphasize companies and issues students already know about or are likely to find intriguing. For example, cases in recent editions have addressed location-based social networking (the business communication implications of the FourSquare game app), employer restrictions on social media, and the use of Twitter in the job-search process.
- **Integrated learning.** In sharp contrast to texts that tack on coverage of social media and other new topics, Bovée and Thill continually revise their coverage to fully integrate the skills and issues that are important in today's workplace. This integration is carried through chapter-opening vignettes, chapter content, model documents, end-of-chapter questions, communication cases, and test banks to make sure students practice the skills they'll need, not just read about them in some anecdotal fashion.
- **Added value with unique, free resources for instructors and students.** From the groundbreaking Real-Time Updates to *Business Communication Headline News* to videos specially prepared for instructors, Bovée and Thill adopters can take advantage of an unmatched array of free resources to enhance the classroom experience and keep course content fresh. Please see pages 27–29 for a complete list.

# In-Depth Coverage of Digital, Social, and Mobile Media Topics in the Seventh Edition

*Business Communication Essentials* offers in-depth coverage of new and emerging media skills and concepts. These tables show where you can find major areas of coverage, figures, and communication cases that expose students to professional use of social media, mobile media, and other new technologies.

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# Extending the Value of Your Textbook with Free Multimedia Content

*Business Communication Essentials*'s unique Real-Time Updates system automatically provides weekly content updates, including interactive websites, infographics, podcasts, PowerPoint presentations, online videos, PDF files, and articles. You can subscribe to updates chapter by chapter, so you get only the material that applies to your current chapter. Visit **http://real-timeupdates.com/bce7** to subscribe.

# For Instructors: Features and Resources to Enhance the Course Experience

## TARGET AUDIENCE

With its balanced coverage of basic business English, communication strategies, and cutting-edge technologies, *Business Communication Essentials* is ideal for introductory business communication courses in any curriculum, in any format—in-class, online, or hybrid. Its compact, 14-chapter organization is particularly well suited to quarter calendars as well as to longer courses in which an instructor wants to have time available to supplement the text with service projects, business plan development, or other special activities.

For a more in-depth look at business communication with an emphasis on written communication, the authors' *Excellence in Business Communication* is ideal for business communication courses that feature more report writing and similar activities. For comprehensive treatment of business communication in the broadest sense (including digital video and managerial issues such as crisis communication), you may find the authors' *Business Communication Today* to be the most effective text.

Colleges and universities vary in the prerequisites established for the business communication course, but we advise at least one course in English composition. Some coursework in business studies will also give students a better perspective on communication challenges in the workplace. However, we have taken special care not to assume that students have any in-depth business experience, so *Business Communication Essentials* works quite well for those with limited work experience or business coursework.

## A TOTAL TEACHING AND LEARNING SOLUTION

*Business Communication Essentials* is a fully integrated presentation of communication fundamentals. The concise, 14-chapter text provides clear advice, numerous examples for students to follow, and hundreds of student questions, activities, and projects. The integrated workbook "Improve Your Grammar, Mechanics, and Usage" appears at the end of every chapter, with three levels of assessment and skill building in workplace applications and document critiques. The "Handbook of Grammar, Mechanics, and Usage" serves as a convenient reference.

These components work together at four levels to provide seamless coverage of the essentials, from previewing to developing to enhancing to reinforcing:

- **Previewing.** Each chapter prepares students with clear learning objectives and an insightful "Communication Matters" quotation that highlights the principles covered in the chapter. Each learning objective aligns with a major heading in the chapter, and this structure is carried on through to the end-of-chapter and online activities, making it easier for instructors and students to gauge learning progress.
- **Developing.** Chapter content develops, explains, and elaborates on concepts with a carefully organized presentation of textual and visual material. The three-step process of planning, writing, and completing is clearly explained and reinforced throughout the course. Some texts introduce a writing process model and then rarely, if ever, discuss it again, giving students few opportunities to practice and leaving them to wonder just how important the process really is. *Business Communication Essentials* applies the three-step process to every category of message in every medium, from traditional letters and reports to email, blogs, IM, podcasts, wikis, mobile media, and social networking messages. Students get to leverage the skills they learn early in the course—and realize they are acquiring the skills to tackle any communication challenge that may come their way.
- **Enhancing.** Contemporary examples, including more than 40 new figures in this edition, show students the specific elements that contribute to or detract from successful messages. In addition, the *Real-Time Updates—Learn More* feature connects students with dozens of carefully selected online media elements that provide examples and insights from successful professionals.

- **Reinforcing.** Student success in any communication course depends on practice, feedback, analysis, and reinforcement. With hundreds of realistic exercises and activities, *Business Communication Essentials* offers an unparalleled array of opportunities for students to practice vital skills and put newfound knowledge to immediate use. These resources are logically sorted by category, including "Test Your Knowledge," "Apply Your Knowledge," "Practice Your Skills," and "Expand Your Skills." Communication cases, most featuring real companies, encourage students to think about contemporary business issues as they put their skills to use in a variety of media, including blogging and podcasting. The integrated workbook "Improve Your Grammar, Mechanics, and Usage" further reinforces student skills by helping them assess their current knowledge levels, improve individual sentences, and critique documents.

At every stage of the learning experience, *Business Communication Essentials* provides the tools instructors and students need in order to succeed.

| Features That Help Students Build Essential Knowledge and Skills | Previewing | Developing | Enhancing | Reinforcing |
|---|---|---|---|---|
| Learning objectives (beginning of chapter) | ● | | | |
| Communication Matters (beginning of chapter) | ● | | | |
| Concise presentations of fundamentals (within chapter) | | ● | | |
| Managerial and strategic perspectives on key topics (within chapter) | | ● | | |
| Three-step writing process discussion and diagrams (within chapter) | | ● | | |
| Real-life examples (within chapter) | | | ● | |
| Annotated model documents (within chapter) | | | ● | |
| Highlight boxes (within chapter) | | | ● | |
| Handbook of Grammar, Mechanics, and Usage (end of book) | | | ● | |
| Learn More media resources (online) | | | ● | |
| MyBcommLab (online) | | | ● | ● |
| Real-Time Updates (online) | | | ● | ● |
| Marginal notes for quick review (within chapter) | | | | ● |
| Check Your Progress (end of chapter) | | | | ● |
| Test Your Knowledge questions (end of chapter) | | | | ● |
| Apply Your Knowledge questions (end of chapter) | | | | ● |
| Practice Your Skills activities and exercises (end of chapter) | | | | ● |
| Expand Your Skills activities (end of chapter/online) | | | | ● |
| Improve Your Grammar, Mechanics, and Usage exercises (end of chapter) | | | | ● |
| Bovée and Thill wiki simulator (online) | | | | ● |
| Cases (following Chapters 6–14) | | | | ● |
| Document Makeovers (online) | | | | ● |

## FULL SUPPORT FOR AACSB LEARNING STANDARDS

The American Association of Collegiate Schools of Business (AACSB) is a not-for-profit corporation of educational institutions, corporations, and other organizations devoted to the promotion and improvement of higher education in business administration and accounting. A collegiate institution offering degrees in business administration or accounting may volunteer for AACSB accreditation review. The AACSB makes initial accreditation decisions and conducts periodic reviews to promote continuous quality improvement in management education. Pearson Education is a proud member of the AACSB and is pleased to provide advice to help you apply AACSB Learning Standards.

Curriculum quality is one of the most important criteria for AACSB accreditation. Although no specific courses are required, the AACSB expects a curriculum to include learning experiences in the following areas:

- Written and oral communication
- Ethical understanding and reasoning
- Analytical thinking
- Information technology
- Interpersonal relations and teamwork
- Diverse and multicultural work environments
- Reflective thinking
- Application of knowledge

Throughout *Business Communication Essentials*, you'll find student exercises and activities that support the achievement of these important goals, and the questions in the accompanying test bank are tagged with the appropriate AACSB category.

## UNMATCHED COVERAGE OF ESSENTIAL COMMUNICATION TECHNOLOGIES

The Bovée and Thill series continues to lead the field with unmatched coverage of communication technologies, reflecting the expectations and opportunities in today's workplace:

- Applicant tracking systems
- Assistive technologies
- Automated reputation analysis
- Avatars
- Backchannel
- Blogs
- Cloud computing
- Clustering engines
- Community Q&A websites
- Computer animation
- Content curation
- Crowdsourcing
- Data visualization
- Digital documents
- Digital whiteboards
- Email
- Emoticons
- Enterprise instant messaging
- E-portfolios
- Extranets
- Gamification
- Geographic information systems
- Graphics software
- Groupware and shared online workspaces
- Infographics
- Information architecture
- Instant messaging
- Intellectual property rights
- Interactivity
- Internet telephony (Skype)
- Interview simulators
- Intranets
- Knowledge management systems
- Lifestreaming
- Linked and embedded documents
- Location-based social networking
- Microblogs
- Mobile business apps
- Multimedia documents
- Multimedia presentations
- Multimedia résumés
- Newsfeeds
- Online brainstorming systems
- Online research techniques
- Online survey tools
- Online video
- Podcasts
- PowerPoint animation
- Really Simple Syndication (RSS)
- Screencasts
- Search and metasearch engines
- Search engine optimization (SEO)
- Security and privacy concerns in electronic media
- Sentiment analysis
- Social bookmarking
- Social commerce
- Social media
- Social media résumés
- Social networking
- Tagging
- Templates and style sheets
- Teleconferencing and telepresence
- Text messaging
- Translation software
- User-generated content
- Video interviews
- Video résumés
- Videoconferencing
- Virtual communities
- Virtual meetings
- Virtual whiteboards
- Web content management systems
- Web directories
- Webcasts
- Website accessibility
- Wikis
- Workforce analytics

## COURSE PLANNING GUIDE

Although *Business Communication Essentials* follows a conventional sequence of topics, it is structured so that you can address topics in whatever order best suits your needs. For instance, if you want to begin by reviewing grammar, sentence structure, and other writing fundamentals, you can ask students to read Chapter 4, the chapter on "Writing Business Messages" and then the "Handbook of Grammar, Mechanics, and Usage." Conversely, if you want to begin with employment-related communication, you can start with the Prologue, “Building a Career with Your Communication Skills,” followed by Chapters 13 and 14.

The following table suggests a sequence and a schedule for covering the chapters in the textbook, with time allocations based on the total number of class hours available.

| Chapter Number and Title | | Hours Devoted to Each Chapter | | |
|---|---|---|---|---|
| | | 30-Hour Course | 45-Hour Course | 60-Hour Course |
| | Prologue: Building a Career with Your Communication Skills | 0.5 | 0.5 | 0.5 |
| 1 | Professional Communication in Today’s Digital, Social, Mobile World | 1 | 1 | 1 |
| 2 | Collaboration, Interpersonal Communication, and Business Etiquette | 2 | 2 | 2 |
| 3 | Planning Business Messages | 2 | 3 | 4 |
| 4 | Writing Business Messages | 2 | 3 | 4 |
| C | Correction Symbols | 0.5 | 0.5 | 0.5 |
| 5 | Completing Business Messages | 2 | 3 | 4 |
| | Handbook of Grammar, Mechanics, and Usage | 1 | 2 | 2 |
| 6 | Crafting Messages for Digital Channels | 2 | 3 | 6 |
| A | Format and Layout of Business Documents | 1 | 1 | 1 |
| 7 | Writing Routine and Positive Messages | 2 | 2 | 3 |
| 8 | Writing Negative Messages | 2 | 2 | 3 |
| 9 | Writing Persuasive Messages | 2 | 2 | 3 |
| B | Documentation of Report Sources | 1 | 1 | 2 |
| 10 | Understanding and Planning Reports and Proposals | 2 | 5 | 6 |
| 11 | Writing and Completing Reports and Proposals | 2 | 4 | 6 |
| 12 | Developing and Delivering Business Presentations | 1 | 4 | 4 |
| 13 | Building Careers and Writing Résumés | 2 | 3 | 4 |
| 14 | Applying and Interviewing for Employment | 2 | 3 | 4 |

## INSTRUCTOR RESOURCES AND SUPPORT OPTIONS

*Business Communication Essentials* is backed by an unmatched selection of resources for instructors and students, many of which were pioneered by the authors and remain unique in the field.

### Online Communities and Media Resources

Instructors are welcome to take advantage of the many free online resources provided by Bovée and Thill:

- Sponsorship of Teaching Business Communication instructors’ communities (open to all) and Bovée and Thill’s Inner Circle for Business Communication (for adopters only) on LinkedIn and Facebook
- Instructor tips and techniques in Bovée and Thill’s Business Communication Blog and Twitter feed
- The Bovée and Thill channel on YouTube, with videos that offer advice on teaching the new elements of business communication
- The unique Real-Time Updates content-updating service (see page 23)
- The popular Business Communication Headline News service
- A variety of videos and PowerPoint presentations on SlideShare
- More than 500 infographics, videos, articles, podcasts, and PowerPoints on Business Communication Pictorial Gallery on Pinterest
- A visual display of trending Bovée and Thill tweets on Twylah

We also invite you to peruse Bovée and Thill's Online Magazines for Business Communication on Scoop.it:

- Business Communication 2.0: Social Media and Electronic Communication
- Teaching a Modern Business Communication Course
- How the Mobile Revolution Is Changing Business Communication
- Teaching Business Communication and Workplace Issues
- Teaching Business Communication and Interpersonal Communication
- Teaching Oral Communication in a Business Communication Course
- Teaching Business Communication and Employment
- Teaching Visual Communication
- Exclusive Teaching Resources for Business Communication Instructors

Links to all these services and resources can be found at **http://blog.businesscommunicationnetwork.com**.

### Business Communication Headline News

Stay on top of hot topics, important trends, and new technologies with Business Communication Headline News (**http://bchn.businesscommunicationnetwork.com**), the most comprehensive business communication site on the Internet. Every weekday during the school year, we offer fresh lecture content and provide a wide range of research and teaching tools on the website, including a custom web search function that we created expressly for business communication research.

Take advantage of the newsfeeds to get late-breaking news in headlines with concise summaries. You can scan incoming items in a matter of seconds and simply click through to read the full articles that interest you. All articles and accompanying multimedia resources are categorized by topic and chapter for easy retrieval at any time.

This free service for adopters offers numerous ways to enhance lectures and student activities:

- Keep current with the latest information and trends in the field.
- Easily update your lecture notes with fresh material.
- Create visuals for your classroom presentations.
- Supplement your lectures with cutting-edge handouts.
- Gather podcasts, online video, and other new media examples to use in the classroom.
- Enhance your research projects with the newest data.
- Compare best practices from other instructors.
- Improve the quality and effectiveness of your teaching by reading about new teaching tips and techniques.

At the website, you also get free access to these powerful instructional resources:

- **Business Communication Web Search,** featuring a revolutionary approach to searching developed by the authors that lets you quickly access more than 325 search engines. The tool uses a simple and intuitive interface engineered to help business communication instructors find precisely what they want, whether it's PowerPoint files, PDF files, Microsoft Word documents, Excel files, videos, or podcasts.
- **Real-Time Updates** are newsfeeds and content updates tied directly to specific points throughout the text. Each content update is classified by the type of media featured: interactive website, infographic, article, video, podcast, PowerPoint, or PDF. Additional sections on the site include Instructor Messages and Instructor Media (both password protected), Student Messages, and Student Assignments.

You can subscribe to Business Communication Headline News and get delivery by email, MyYahoo or iGoogle homepage, RSS newsreader, mobile phone, instant messenger, MP3, Twitter, Facebook, and a host of other options.

### Bovée and Thill Business Communication Blog

The Bovée and Thill Business Communication Blog (**http://blog.businesscommunicationnetwork.com/**) offers original articles that help instructors focus their teaching to help students learn more efficiently and effectively. Articles discuss a wide variety of topics, including new topics instructors should be teaching their students, resources instructors can use in their classes, solutions to common teaching challenges, and great examples and activities instructors can use in class.

### Authors' Email Hotline for Faculty

Integrity, excellence, and responsiveness are our hallmarks. That means providing you with textbooks that are academically sound, creative, timely, and sensitive to instructor and student needs. As an adopter of *Business Communication Essentials,* you are invited to use our Email Hotline (**hotline@businesscommunicationblog.com**) if you ever have a question or concern related to the text or its supplements.

### Instructor Resources

At the Instructor Resource Center, **www.pearsonglobaleditions.com/Bovee**, instructors can easily register to gain access to a variety of instructor resources available with this text in downloadable format. If assistance is needed, our dedicated technical support team is ready to help with the media supplements that accompany this text. Visit **http://247pearsoned.custhelp.com/** for answers to frequently asked questions and toll-free user-support phone numbers.

The following supplements are available with this text

- Instructor's Resource Manual
- Test Bank
- TestGen® Computerized Test Bank (and various conversions)
- PowerPoint Presentation

## For Students: How This Course Will Help You

No matter what profession you want to pursue, the ability to communicate will be an essential skill—and a skill that employers expect you to have when you enter the workforce. This course introduces you to the fundamental principles of business communication and gives you the opportunity to develop your communication skills. You'll discover how business communication differs from personal and social communication, and you'll see how today's companies are using blogs, social networks, podcasts, virtual worlds, wikis, and other technologies. You'll learn a simple three-step writing process that works for all types of writing and speaking projects, both in college and on the job. Along the way, you'll gain valuable insights into ethics, etiquette, listening, teamwork, and nonverbal communication. Plus, you'll learn effective strategies for the many types of communication challenges you'll face on the job, from writing routine messages about transactions to producing complex reports and websites.

Few courses can offer the three-for-the-price-of-one value you get from a business communication class. Check out these benefits:

- **In your other classes.** The communication skills you learn in this class can help you in every other course you take in college. From simple homework assignments to complicated team projects to class presentations, you'll be able to communicate more effectively with less time and effort.
- **During your job search.** You can reduce the stress of searching for a job and stand out from the competition. Every activity in the job-search process relies on communication. The better you can communicate, the more successful you'll be at landing interesting and rewarding work.

- **On the job.** After you get that great job, the time and energy you have invested in this course will continue to yield benefits year after year. As you tackle each project and every new challenge, influential company leaders—the people who decide how quickly you'll get promoted and how much you'll earn—will be paying close attention to how well you communicate. They will observe your interactions with colleagues, customers, and business partners. They'll take note of how well you can collect data, find the essential ideas buried under mountains of information, and convey those points to other people. They'll observe your ability to adapt to different audiences and circumstances. They'll be watching when you encounter tough situations that require careful attention to ethics and etiquette. The good news: Every insight you gain and every skill you develop in this course will help you shine in your career.

## HOW TO SUCCEED IN THIS COURSE

Although this course explores a wide range of message types and appears to cover quite a lot of territory, the underlying structure of the course is actually rather simple. You'll learn a few basic concepts, identify some key skills to use and procedures to follow—and then practice, practice, practice. Whether you're writing a blog posting in response to one of the real-company cases or drafting your own résumé, you'll be practicing the same skills again and again. With feedback and reinforcement from your instructor and your classmates, your confidence will grow and the work will become easier and more enjoyable.

The following sections offer advice on approaching each assignment, using your textbook, and taking advantage of some other helpful resources.

### Approaching Each Assignment

In the spirit of practice and improvement, you will have a number of writing (and possibly speaking) assignments throughout this course. These suggestions will help you produce better results with less effort:

- **First, don't panic!** If the thought of writing a report or giving a speech sends a chill up your spine, you're not alone. Everybody feels that way when first learning business communication skills, and even experienced professionals can feel nervous about major projects. Keeping three points in mind will help. First, every project can be broken down into a series of small, manageable tasks. Don't let a big project overwhelm you; it's nothing more than a bunch of smaller tasks. Second, remind yourself that you have the skills you need to accomplish each task. As you move through the course, the assignments are carefully designed to match the skills you've developed up to that point. Third, if you feel panic creeping up on you, take a break and regain your perspective.
- **Focus on one task at a time.** A common mistake writers make is trying to organize and express their ideas while simultaneously worrying about audience reactions, grammar, spelling, formatting, page design, and a dozen other factors. Fight the temptation to do everything at once; otherwise, your frustration will soar and your productivity will plummet. In particular, don't worry about grammar, spelling, and word choices during your first draft. Concentrate on the organization of your ideas first, then the way you express those ideas, and then the presentation and production of your messages. Following the three-step writing process is an ideal way to focus on one task at a time in a logical sequence.
- **Give yourself plenty of time.** As with every other school project, putting things off to the last minute creates unnecessary stress. Writing and speaking projects in particular are much easier if you tackle them in small stages with breaks in between, rather than trying to get everything done in one frantic blast. Moreover, there will be instances when you simply get stuck on a project, and the best thing to do is walk away and give your mind a break. If you allow room for breaks in your schedule, you'll minimize the frustration and spend less time overall on your homework, too.
- **Step back and assess each project before you start.** The writing and speaking projects you'll have in this course cover a wide range of communication scenarios, and it's

essential that you adapt your approach to each new challenge. Resist the urge to dive in and start writing without a plan. Ponder the assignment for a while, consider the various approaches you might take, and think carefully about your objectives before you start writing. Nothing is more frustrating than getting stuck halfway through because you're not sure what you're trying to say or you've wandered off track. Spend a little time planning, and you'll spend a lot less time writing.

- **Use the three-step writing process.** Those essential planning tasks are the first step in the three-step writing process, which you'll learn about in Chapter 3 and use throughout the course. This process has been developed and refined by professional writers with decades of experience and thousands of projects ranging from short blog posts to 500-page textbooks. It works, so take advantage of it.
- **Learn from the examples and model documents.** This textbook offers dozens of realistic examples of business messages, many with notes along the sides that explain strong and weak points. Study these and any other examples that your instructor provides. Learn what works and what doesn't, then apply these lessons to your own writing.
- **Learn from experience.** Finally, learn from the feedback you get from your instructor and from other students. Don't take the criticism personally; your instructor and your classmates are commenting about the work, not about you. View every bit of feedback as an opportunity to improve.

## Using This Textbook Package

This book and its accompanying online resources introduce you to the key concepts in business communication while helping you develop essential skills. As you read each chapter, start by studying the learning objectives. They will help you identify the most important concepts in the chapter and give you a feel for what you'll be learning. Each learning objective corresponds to one major heading within the chapter, so you can easily find the information it relates to. Following the learning objectives, the "Communication Matters" feature offers helpful advice from a successful professional who uses the same skills you will be learning in the chapter.

At the end of each chapter, "Learning Objectives: Check Your Progress" gives you the chance to quickly verify your grasp of important concepts. Following that, you'll see two sets of questions that will help you test and apply your knowledge, and two sets of projects that will help you practice and expand your skills. Chapters 6 through 14 also feature communication cases, which are more-involved projects that require you to plan and complete a variety of messages and documents. All these activities are tagged by learning objective, so if you have any questions about the concepts you need to apply, just revisit that part of the chapter.

Several chapters have activities with downloadable media such as presentations and podcasts; if your instructor assigns these elements, follow the instructions in the text to locate the correct files. You can also download the two-page Quick Learning Guide to review the essential points from the chapter.

In addition to the 14 chapters of the text itself, here are some special features that will help you succeed in the course and on the job:

- **Prologue: Building a career with your communication skills.** This section (immediately following this Preface) helps you understand today's dynamic workplace, the steps you can take to adapt to the job market, and the importance of creating an employment portfolio and building your personal brand.
- **Handbook.** The Handbook of Grammar, Mechanics, and Usage (see page 467) is a convenient reference for essential business English.
- **Real-Time Updates.** You can use this unique newsfeed service to make sure you're always kept up to date on important topics. Plus, at strategic points in every chapter, you will be directed to the Real-Time Updates website to get the latest information about specific subjects. To sign up, visit **http://real-timeupdates.com/bce7**.
- **Business communication web search.** With our unique web search approach, you can quickly access more than 325 search engines. This tool uses a simple and intuitive interface engineered to help you find precisely what you want, whether it's PowerPoint files,

PDF files, Microsoft Word documents, Excel files, videos, podcasts, videos, or social bookmarks. Check it out at **http://websearch.businesscommunicationnetwork.com**.

- **CourseSmart eTextbooks online.*** CourseSmart is an exciting new choice for students looking to save money. As an alternative to buying the print textbook, you can purchase an electronic version of the same content and receive a significant discount off the suggested list price of the print text. With a CourseSmart eTextbook, you can search the text, make notes online, print out reading assignments that incorporate lecture notes, and bookmark important passages for later review. For more information or to purchase access to the CourseSmart eTextbook, visit **www.coursesmart.co.uk**.

## About the Authors

Courtland L. Bovée and John V. Thill have been leading textbook authors for more than two decades, introducing millions of students to the fields of business and business communication. Their award-winning texts are distinguished by proven pedagogical features, extensive selections of contemporary case studies, hundreds of real-life examples, engaging writing, thorough research, and the unique integration of print and electronic resources. Each new edition reflects the authors' commitment to continuous refinement and improvement, particularly in terms of modeling the latest practices in business and the use of technology.

Professor Bovée has 22 years of teaching experience at Grossmont College in San Diego, where he has received teaching honors and was accorded that institution's C. Allen Paul Distinguished Chair. Mr. Thill is a prominent communications consultant who has worked with organizations ranging from Fortune 500 multinationals to entrepreneurial start-ups. He formerly held positions with Pacific Bell and Texaco.

Courtland Bovée and John Thill were recently awarded proclamations from the Governor of Massachusetts for their lifelong contributions to education and for their commitment to the summer youth baseball program that is sponsored by the Boston Red Sox.

## Acknowledgments

The seventh edition of *Business Communication Essentials* reflects the professional experience of a large team of contributors and advisors. We express our thanks to the many individuals whose valuable suggestions and constructive comments influenced the success of this book.

### REVIEWERS OF PREVIOUS EDITIONS

Thank you to the following professors: Lydia E. Anderson, *Fresno City College*; Victoria Austin, *Las Positas College*; Faridah Awang, *Eastern Kentucky University*; Jeanette Baldridge, *University of Maine at Augusta*; Diana Baran, *Henry Ford Community College*; JoAnne Barbieri, *Atlantic Cape Community College*; Kristina Beckman, *John Jay College*; Judy Bello, *Lander University*; George Bernard, *Seminole State College*; Carol Bibly, *Triton College*; Nancy Bizal, *University of Southern Indiana*; Yvonne Block, *College of Lake County*; Edna Boroski, *Trident Technical College*; Nelvia M. Brady, *Trinity Christian College*; Arlene Broeker, *Lincoln University*; David Brooks, *Indiana University Southeast*; Carol Brown, *South Puget Sound Community College*; Domenic Bruni, *University of Wisconsin*; Jeff Bruns, *Bacone College*; Gertrude L. Burge, *University of Nebraska*; Sharon Burton, *Brookhaven College*; Robert Cabral, *Oxnard College*; Dorothy Campbell, *Brevard Community College*; Linda Carr, *University of West Alabama*; Alvaro Carreras, Jr., *Florida International University*; Sharon Carson, *St. Philip's College*; Rick Carter, *Seattle University*; Dacia Charlesworth, *Indiana University–Purdue University Fort Wayne*; Jean Chenu, *Genesee Community College*; Connie Clark, *Lane Community College*; Alvin Clarke, *Iowa State University*; Jerrie Cleaver, *Central Texas College*; Clare Coleman, *Temple University*; Michael P. Collins, *Northern Arizona University*; M. Cotton, *North Central Missouri College*; Pat Cowherd, *Campbellsville University*; Pat Cuchens, *University of Houston–Clear Lake*; Walt Dabek, *Post University*; Cathy Daly,

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*California State University–Sacramento*; Linda Davis, *Copiah–Lincoln Community College*; Christine R. Day, *Eastern Michigan University*; Harjit Dosanjh, *North Seattle Community College*; Amy Drees, *Defiance College*; Cynthia Drexel, *Western State College of Colorado*; Lou Dunham, *Spokane Falls Community College*; Donna Everett, *Morehead State University*; Donna Falconer, *Anoka–Ramsey Community College*; Kate Ferguson Marsters, *Gannon University*; Darlynn Fink, *Clarion University of Pennsylvania*; Bobbi Fisher, *University of Nebraska–Omaha*; Laura Fitzwater, *Community College of Philadelphia*; Lynda K. Fuller, *Wilmington University*; Matthew Gainous, *Ogeechee Technical College*; Yolande Gardner, *Lawson State Community College*; Gina Genova, *University of California–Santa Barbara*; Lonny Gilbert, *Central State University*; Camille Girardi-Levy, *Siena College*; Nancy Goehring, *Monterey Peninsula College*; Dawn Goellner, *Bethel College*; Robert Goldberg, *Prince George's Community College*; Jeffrey Goldberg, *MassBay Community College*; Helen Grattan, *Des Moines Area Community College*; Barbara Grayson, *University of Arkansas at Pine Bluff*; Deborah Griffin, *University of Houston–Clear Lake*; Alice Griswold, *Clarke College*; Bonnie Grossman, *College of Charleston*; Lisa Gueldenzoph, *North Carolina A&T State University*; Wally Guyot, *Fort Hays State University*; Valerie Harrison, *Cuyamaca College*; Tim Hartge, *The University of Michigan–Dearborn*; Richard Heiens, *University of South Carolina–Aiken*; Maureece Heinert, *Sinte Gleska University*; Leighanne Heisel, *University of Missouri–St. Louis*; Gary Helfand, *University of Hawaii–West Oahu*; Cynthia Herrera, *Orlando Culinary Academy*; Kathy Hill, *Sam Houston State University*; Pashia Hogan, *Northeast State Tech Community College*; Cole Holmes, *The University of Utah*; Sarah Holmes, *New England Institute of Technology*; Ruth Hopkins Zajdel, *Ohio University—Chillicothe*; Sheila Hostetler, *Orange Coast College*; Michael Hricik, *Westmoreland County Community College*; Rebecca Hsiao, *East Los Angeles College*; Mary Ann Hurd, *Sauk Valley Community College*; Pat Hurley, *Leeward Community College*; Harold Hurry, *Sam Houston State University*; Marcia James, *University of Wisconsin–Whitewater*; Frank Jaster, *Tulane University*; Jonatan Jelen, *Parsons The New School for Design*; Irene Joanette Gallio, *Western Nevada Community College*; Edgar Dunson Johnson III, *Augusta State University*; Mark Johnson, *Rhodes State College*; Joanne Kapp, *Siena College*; Jeanette A. Karjala, *Winona State University*; Christy L. Kinnion, *Lenior Community College*; Deborah Kitchin, *City College of San Francisco*; Lisa Kirby, *North Carolina Wesleyan College*; Claudia Kirkpatrick, *Carnegie Mellon University*; Betty Kleen, *Nicholls State University*; Fran Kranz, *Oakland University*; Jana Langemach, *University of Nebraska–Lincoln*; Joan Lantry, *Jefferson Community College*; Kim Laux, *Saginaw Valley State University*; Kathryn J. Lee, *University of Cincinnati*; Anita Leffel, *The University of Texas, San Antonio*; Ruth Levy, *Westchester Community College*; Nancy Linger, *Moraine Park Technical College*; Jere Littlejohn, *University of Mississippi*; Dana Loewy, *California State University–Fullerton*; Jennifer Loney, *Portland State University*; Susan Long, *Portland Community College*; Sue Loomis, *Maine Maritime Academy*; Thomas Lowderbaugh, *University of Maryland–College Park*; Jayne Lowery, *Jackson State Community College*; Lloyd Matzner, *University of Houston–Downtown*; Ron McNeel, *New Mexico State University at Alamogordo*; Dr. Bill McPherson, *Indiana University of Pennsylvania*; Phyllis Mercer, *Texas Woman's University*; Donna Meyerholz, *Trinidad State Junior College*; Annie Laurie I. Meyers, *Northampton Community College*; Catherine "Kay" Michael, *St. Edward's University*; Kathleen Miller, *University of Delaware*; Gay Mills, *Amarillo College*; Julie Mullis, *Wilkes Community College*; Pamela Mulvey, *Olney Central College*; Jimidene Murphey, *Clarendon College*; Cindy Murphy, *Southeastern Community College*; Dipali Murti-Hali, *California State University–Stanislaus*; Shelley Myatt, *University of Central Oklahoma*; Cora Newcomb, *Technical College of the Lowcountry*; Ron Newman, *Crafton Hills College*; Linda Nitsch, *Chadron State College*; Leah Noonan, *Laramie County Community College*; Mabry O'Donnell, *Marietta College*; Diana Oltman, *Central Washington University*; Ranu Paik, *Santa Monica College*; Lauren Paisley, *Genesee Community College*; Patricia Palermo, *Drew University*; John Parrish, *Tarrant County College*; Diane Paul, *TVI Community College*; John T. Pauli, *University of Alaska–Anchorage*; Michael Pennell, *University of Rhode Island*; Sylvia Beaver Perez, *Nyack College*; Melinda Phillabaum, *Indiana University*; Ralph Phillips, *Geneva College*; Laura Pohopien, *Cal Poly Pomona*; Diane Powell, *Utah Valley State College*; Christine Pye, *California Lutheran University*; Norma Pygon, *Triton College*; Dave Rambow, *Wayland Baptist University*; Richard David Ramsey, *Southeastern Louisiana University*; Charles Riley, *Tarrant County College–Northwest Campus*; Jim Rucker, *Fort Hays State University*; Dr. Suzan Russell, *Lehman College*; Storm Russo, *Valencia College*; Danielle Scane, *Orange Coast College*; Calvin Scheidt, *Tidewater Community College*; Nancy Schneider, *University of Maine at Augusta*; Brian Sheridan, *Mercyhurst College*; Melinda Shirey, *Fresno City College*; Bob Shirilla, *Colorado State University*; Joyce Simmons, *Florida State University*; Gordon J. Simpson, *SUNY Cobleskill*; Peggy Simpson, *Dominican University*; Eunice Smith, *Bismarck State College*; Jeff Smith, *University of Southern California*; Lorraine M. Smith, *Fresno City College*; Harvey Solganick, *LeTourneau University–Dallas Campus*; Stephen Soucy, *Santa Monica College*; Linda Spargo, *University of Mississippi*; W. Dees Stallings, *Park University*; Sally Stanton, *University of Wisconsin-Milwaukee*; Mark Steinbach, *Austin Community College*; Angelique Stevens, *Monroe Community College*; Steven Stovall, *Wilmington College*; Alden Talbot, *Weber State University*; Michele Taylor, *Ogeechee Technical College*; Wilma Thomason, *Mid-South Community College*; Ed Thompson, *Jefferson Community College*; Ann E. Tippett, *Monroe Community College*; Lori Townsend, *Niagara County Community College*; Lani Uyeno, *Leeward Community College*; Wendy Van Hatten, *Western Iowa Tech Community College*; Jay Wagers, *Richmond Community College*; John Waltman, *Eastern Michigan University*; Jie Wang, *University of Illinois at Chicago*; Chris Ward, *The University of Findlay*; Dorothy Warren, *Middle Tennessee State University*; Glenda Waterman, *Concordia University*; Kellie Welch, *Jefferson Community College*; Bradley S. Wesner, *Nova Southeastern University*; Mathew Williams, *Clover Park Technical College*; Beth Williams, *Stark State College of Technology*; Brian Wilson, *College of Marin*; and Sandra D. Young, *Orangeburg–Calhoun Technical College*.

## REVIEWERS OF DOCUMENT MAKEOVERS

We sincerely thank the following reviewers for their assistance with the Document Makeover feature: Lisa Barley, *Eastern Michigan University*; Marcia Bordman, *Gallaudet University*; Jean Bush-Bacelis, *Eastern Michigan University*; Bobbye Davis, *Southern Louisiana University*; Cynthia Drexel, *Western State College of Colorado*; Kenneth Gibbs, *Worcester State College*; Ellen Leathers, *Bradley University*; Diana McKowen, *Indiana University*; Bobbie Nicholson, *Mars Hill College*; Andrew Smith, *Holyoke Community College*; Jay Stubblefield, *North Carolina Wesleyan College*; Dawn Wallace, *Southeastern Louisiana University*.

## PERSONAL ACKNOWLEDGMENTS

We wish to extend a heartfelt thanks to our many friends, acquaintances, and business associates who provided materials or agreed to be interviewed so that we could bring the real world into the classroom.

A very special acknowledgment goes to George Dovel, whose superb writing skills, distinguished background, and wealth of business experience assured this project of clarity and completeness. Also, recognition and thanks to Jackie Estrada for her outstanding skills and excellent attention to details. Her creation of the "Peak Performance Grammar and Mechanics" material is especially noteworthy.

We also feel it is important to acknowledge and thank the Association for Business Communication, an organization whose meetings and publications provide a valuable forum for the exchange of ideas and for professional growth.

In addition, we would like to thank Myles Hassell of the University of New Orleans, Susan Schanne of Eastern Michigan University and Maureen Steddin for their assistance in preparing supplements for this new edition.

We want to extend our warmest appreciation to the devoted professionals at Pearson Higher Education for their commitment to producing high-value, student-focused texts, including Tim Bozik, president; Stephanie Wall, editor-in-chief; Maggie Moylan, vice president of product marketing: Nicole Sam, acquisitions editor, Claudia Fernandes and Denise Vaughn, program managers; Nicole Suddeth, project manager; Judy Leale, senior managing editor of production. We are also grateful to Christian Holdener of S4Carlisle Publishing Services.

Courtland L. Bovée
John V. Thill

Pearson would like to thank Andre Gomes for contributing to, and Shailja Agarwal, Institute of Management Technology, Ghaziabad; Swapna Koshy, University of Wollongong in Dubai; and Helen Yeh, Hong Kong Polytechnic University, for reviewing the Global Edition.

# Dedication

This book is dedicated to the many thousands of instructors and students who use Bovée and Thill texts to develop career-enhancing skills in business communication. We appreciate the opportunity to play a role in your education, and we wish you the very best with your careers.

**Courtland L. Bovée**
**John V. Thill**

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# Prologue

## BUILDING A CAREER WITH YOUR COMMUNICATION SKILLS

## Using This Course to Help Launch Your Career

This course will help you develop vital communication skills that you'll use throughout your career—and those skills can help you launch an interesting and rewarding career, too. This brief prologue sets the stage by helping you understand today's dynamic workplace, the steps you can take to adapt to the job market, and the importance of creating an employment portfolio and building your personal brand. Take a few minutes to read it while you think about the career you hope to create for yourself.

### UNDERSTANDING THE CHANGING WORLD OF WORK

There is no disguising the fact that you are entering a tough job market, but there are several reasons for at least some hope over the longer term. First, the U.S. economy will recover from the Great Recession, although it's going to take a while before the majority of employers feel confident enough to ramp up hiring significantly. Second, the large demographic bulge of baby boomers is moving into retirement, which should set off a chain reaction of openings from the tops of companies on downward. Third, political and business leaders here and abroad are keenly aware of the problem of unemployment among young adults, both as it affects people looking for work and in the loss of vitality to the economy. For example, programs aimed at helping graduates start companies right out of college, rather than entering the conventional job market, are springing up under government and philanthropic efforts.[1]

The ups and downs of the economic cycle are not the only dynamic elements that will affect your career, however. The nature of employment itself is changing, with a growing number of independent workers and loosely structured *virtual organizations* that engage these workers for individual projects or short-term contracts, rather than hiring employees. In fact, one recent study predicted that independent workers will outnumber conventional employees in the United States by 2020.[2]

This new model of work offers some compelling advantages for workers and companies alike. Companies can lower their fixed costs, adapt more easily to economic fluctuations and competitive moves, and get access to specialized talent for specific project needs.[3] Workers can benefit from the freedom to choose the clients and projects that interest them the most, the flexibility to work as much or as little as they want, and (thanks to advances in communication technology) access to compelling work even if they live far from major employment centers such as New York City or California's Silicon Valley.[4]

On the other hand, this new approach also presents some significant challenges for all parties. These flexibilities and freedoms can create more complexity for workers and managers, diminished loyalties on both sides, uncertainty about the future, issues with skill development and training, and problems with accountability and liability.[5] Many of these challenges involve communication, making solid communication skills more important than ever.

These changes could affect you even if you pursue traditional employment throughout your career. Within organizations, you're likely to work with a combination of "inside" employees and "outside" contractors, which can affect the dynamics of the workplace. And the

Are you comfortable working on your own? Independent workers have become an important part of the global workforce.

availability of more independent workers in the talent marketplace gives employers more options and more leverage, so full-time employees may find themselves competing against freelancers, at least indirectly.

As you navigate this uncertain future, keep two vital points in mind. First, don't wait for your career to just happen: Take charge of your career and stay in charge of it. Explore all your options and have a plan—but be prepared to change course as opportunities and threats appear on the horizon. Second, don't count on employers to take care of you. The era of lifetime employment, in which an employee committed to one company for life with the understanding it would return the loyalty, is long gone. From finding opportunities to developing the skills you need in order to succeed, it's up to you to manage your career and look out for your own best interests.

### How Employers View Today's Job Market

From an employer's perspective, the employment process is always a question of balance. Maintaining a stable workforce can improve practically every aspect of business performance, yet many employers want the flexibility to shrink and expand payrolls as business conditions change. Employers obviously want to attract the best talent, but the best talent is more expensive and more vulnerable to offers from competitors, so there are always financial trade-offs to consider.

Employers also struggle with the ups and downs of the economy. When unemployment is low, the balance of power shifts to employees, and employers have to compete in order to attract and keep top talent. When unemployment is high, the power shifts back to employers, who can afford to be more selective and less accommodating. In other words, pay attention to the economy; at times you can be more aggressive in your demands, but at other times you need to be more accommodating.

Companies view employment as a complex business decision with lots of variables to consider. To make the most of your potential, regardless of the career path you pursue, you need to view employment in the same way.

### What Employers Look for in Job Applicants

Given the complex forces in the contemporary workplace and the unrelenting pressure of global competition, what are employers looking for in the candidates they hire? The short answer: a lot. Like all "buyers," companies want to get as much as they can for the

Communication skills will benefit your career, no matter what path or profession you pursue.

money they spend. The more you can present yourself as the ideal candidate, the better your chances of getting a crack at the most exciting opportunities.

Specific expectations vary by profession and position, of course, but virtually all employers look for the following general skills and attributes:[6]

- **Communication skills.** The reason this item is listed first isn't that you're reading a business communication textbook. Communication is listed first because it is far and away the most commonly mentioned skill set when employers are asked about what they look for in employees. Improving your communication skills will help in every aspect of your professional life.
- **Interpersonal and team skills.** You will have many individual responsibilities on the job, but chances are you won't work alone very often. Learn to work with others—and help them succeed as you succeed.
- **Intercultural and international awareness and sensitivity.** Successful employers tend to be responsive to diverse workforces, markets, and communities, and they look for employees with the same outlook.
- **Data collection, analysis, and decision-making skills.** Employers want people who know how to identify information needs, find the necessary data, convert the data into useful knowledge, and make sound decisions.
- **Digital, social, and mobile media skills.** Today's workers need to know how to use common office software and to communicate using a wide range of digital media and systems.
- **Time and resource management.** If you've had to juggle multiple priorities during college, consider that great training for the business world. Your ability to plan projects and manage the time and resources available to you will make a big difference on the job.
- **Flexibility and adaptability.** Stuff happens, as they say. Employees who can roll with the punches and adapt to changing business priorities and circumstances will go further (and be happier) than employees who resist change.
- **Professionalism.** Professionalism is the quality of performing at the highest possible level and conducting oneself with confidence, purpose, and pride. True professionals strive to excel, continue to hone their skills and build their knowledge, are dependable and accountable, demonstrate a sense of business etiquette, make ethical decisions, show loyalty and commitment, don't give up when things get tough, and maintain a positive outlook.

# Adapting to Today's Job Market

Adapting to the workplace is a lifelong process of seeking the best fit between what you want to do and what employers (or clients, if you work independently) are willing to pay you to do. It's important to think about what you want to do during the many thousands of hours you will spend working, what you have to offer, and how to make yourself more attractive to employers.

## WHAT DO YOU WANT TO DO?

Economic necessities and the vagaries of the marketplace will influence much of what happens in your career, of course, and you may not always have the opportunity to do the kind of work you would really like to. Even if you can't get the job you want right now, though, start your job search by examining your values and interests. Doing so will give you a better idea of where you want to be eventually, and you can use those insights to learn and grow your way toward that ideal situation. Consider these questions:

- **What would you like to do every day?** Research occupations that interest you. Find out what people really do every day. Ask friends, relatives, alumni from your school, and contacts in your social networks. Read interviews with people in various professions to get a sense of what their careers are like.
- **How would you like to work?** Consider how much independence you want on the job, how much variety you like, and whether you prefer to work with products, machines, people, ideas, figures, or some combination thereof.
- **How do your financial goals fit with your other priorities?** For instance, many high-paying jobs involve a lot of stress, sacrifices of time with family and friends, and frequent travel or relocation. If location, lifestyle, intriguing work, or other factors are more important to you, you may well have to sacrifice some level of pay to achieve them.
- **Have you established some general career goals?** For example, do you want to pursue a career specialty such as finance or manufacturing, or do you want to gain experience in multiple areas with an eye toward upper management?
- **What sort of corporate culture are you most comfortable with?** Would you be happy in a formal hierarchy with clear reporting relationships? Or do you prefer less structure? Teamwork or individualism? Do you like a competitive environment?

You might need some time in the workforce to figure out what you really want to do or to work your way into the job you really want, but it's never too early to start thinking about where you want to be. Filling out the assessment in Table 1 might help you get a clearer picture of the nature of work you would like to pursue in your career.

## WHAT DO YOU HAVE TO OFFER?

Knowing what you want to do is one thing. Knowing what a company is willing to pay you to do is another thing entirely. You may already have a good idea of what you can offer employers. If not, some brainstorming can help you identify your skills, interests, and characteristics. Start by jotting down achievements you're proud of and experiences that were satisfying, and think carefully about what specific skills these achievements demanded of you. For example, leadership skills, speaking ability, and artistic talent may have helped you coordinate a successful class project. As you analyze your achievements, you may well begin to recognize a pattern of skills. Which of them might be valuable to potential employers?

Next, look at your educational preparation, work experience, and extracurricular activities. What do your knowledge and experience qualify you to do? What have you learned from volunteer work or class projects that could benefit you on the job? Have you held any offices, won any awards or scholarships, mastered a second language? What skills have you developed in nonbusiness situations that could transfer to a business position?

Take stock of your personal characteristics. Are you aggressive, a born leader? Or would you rather follow? Are you outgoing, articulate, great with people? Or do you prefer

TABLE 1 **Career Self-Assessment**

| Activity or Situation | Strongly Agree | Agree | Disagree | No Preference |
|---|---|---|---|---|
| 1. I want to work independently. | ______ | ______ | ______ | ______ |
| 2. I want variety in my work. | ______ | ______ | ______ | ______ |
| 3. I want to work with people. | ______ | ______ | ______ | ______ |
| 4. I want to work with technology. | ______ | ______ | ______ | ______ |
| 5. I want physical work. | ______ | ______ | ______ | ______ |
| 6. I want mental work. | ______ | ______ | ______ | ______ |
| 7. I want to work for a large organization. | ______ | ______ | ______ | ______ |
| 8. I want to work for a nonprofit organization. | ______ | ______ | ______ | ______ |
| 9. I want to work for a small business. | ______ | ______ | ______ | ______ |
| 10. I want to work for a service business. | ______ | ______ | ______ | ______ |
| 11. I want to start or buy a business someday. | ______ | ______ | ______ | ______ |
| 12. I want regular, predictable work hours. | ______ | ______ | ______ | ______ |
| 13. I want to work in a city location. | ______ | ______ | ______ | ______ |
| 14. I want to work in a small town or suburb. | ______ | ______ | ______ | ______ |
| 15. I want to work in another country. | ______ | ______ | ______ | ______ |
| 16. I want to work outdoors. | ______ | ______ | ______ | ______ |
| 17. I want to work in a structured environment. | ______ | ______ | ______ | ______ |
| 18. I want to avoid risk as much as possible. | ______ | ______ | ______ | ______ |
| 19. I want to enjoy my work, even if that means making less money. | ______ | ______ | ______ | ______ |
| 20. I want to become a high-level corporate manager. | ______ | ______ | ______ | ______ |

working alone? Make a list of what you believe are your four or five most important qualities. Ask a relative or friend to rate your traits as well.

If you're having difficulty figuring out your interests, characteristics, or capabilities, consult your college career center. Many campuses administer a variety of tests that can help you identify interests, aptitudes, and personality traits. These tests won't reveal your "perfect" job, but they'll help you focus on the types of work best suited to your personality.

## HOW CAN YOU MAKE YOURSELF MORE VALUABLE?

While you're figuring out what you want from a job and what you can offer an employer, you can take positive steps toward building your career. First, look for volunteer projects, temporary jobs, freelance work, or internships that will help expand your experience base and skill set.[7] You can look for freelance projects on Craigslist and numerous other websites; some of these jobs have only nominal pay, but they do provide an opportunity for you to display your skills. Also consider applying your talents to *crowdsourcing* projects, in which companies and nonprofit organizations invite the public to contribute solutions to various challenges.

These opportunities help you gain valuable experience and relevant contacts, provide you with important references and work samples for your *employment portfolio*, and help you establish your *personal brand* (see the following sections).

Second, learn more about the industry or industries in which you want to work and stay on top of new developments. Join networks of professional colleagues and friends who can help you keep up with trends and events. Many professional societies have student chapters or offer students discounted memberships. Take courses and pursue other educational or life experiences that would be difficult while working full-time.

## BUILDING AN EMPLOYMENT PORTFOLIO

Employers want proof that you have the skills to succeed on the job, but even if you don't have much relevant work experience, you can use your college classes to assemble that proof. Simply create and maintain an *employment portfolio*, which is a collection of projects that demonstrate your skills and knowledge. You can create a *print portfolio* and an *e-portfolio*; both can help with your career effort. A print portfolio gives you something tangible to bring to interviews, and it lets you collect project results that might not be easy to show online, such as a handsomely bound report. An e-portfolio is a multimedia presentation of your skills and experiences.[8] Think of it as a website that contains your résumé, work samples, letters of recommendation, relevant videos or podcasts you have recorded, any blog posts or articles you have written, and other information about you and your skills. If you have set up a *lifestream* (a real-time aggregation of your content creation, online interests, and social media interactions) that is professionally focused, consider adding that to your e-portfolio. The portfolio can be burned onto a CD or DVD for physical distribution or, more commonly, it can be posted online—whether it's a personal website, your college's site (if student pages are available), a specialized portfolio hosting site such as Behance, or a résumé hosting site such as VisualCV that offers multimedia résumés. To see a selection of student e-portfolios from colleges around the United States, go to **http://real-timeupdates.com/bce7**, click on Student Assignments, and locate the link to student e-portfolios.

Throughout this course, pay close attention to the assignments marked "Portfolio Builder" (they start in Chapter 6). These items will make particularly good samples of not only your communication skills but also your ability to understand and solve business-related challenges. By combining these projects with samples from your other courses, you can create a compelling portfolio when you're ready to start interviewing. Your portfolio is also a great resource for writing your résumé because it reminds you of all the great work you've done over the years. Moreover, you can continue to refine and expand your portfolio throughout your career; many professionals use e-portfolios to advertise their services.

As you assemble your portfolio, collect anything that shows your ability to perform, whether it's in school, on the job, or in other venues. However, you *must* check with employers before including any items that you created while you were an employee and check with clients before including any *work products* (anything you wrote, designed, programmed, and so on) they purchased from you. Many business documents contain confidential information that companies don't want distributed to outside audiences.

For each item you add to your portfolio, write a brief description that helps other people understand the meaning and significance of the project. Include such items as these:

- **Background.** Why did you undertake this project? Was it a school project, a work assignment, or something you did on your own initiative?
- **Project objectives.** Explain the project's goals, if relevant.
- **Collaborators.** If you worked with others, be sure to mention that and discuss team dynamics if appropriate. For instance, if you led the team or worked with others long distance as a virtual team, point that out.
- **Constraints.** Sometimes the most impressive thing about a project is the time or budget constraints under which it was created. If such constraints apply to a project, consider mentioning them in a way that doesn't sound like an excuse for poor quality. If you had only one week to create a website, for example, you might say, "One of the intriguing challenges of this project was the deadline; I had only one week to design, compose, test, and publish this material."
- **Outcomes.** If the project's goals were measurable, what was the result? For example, if you wrote a letter soliciting donations for a charitable cause, how much money did you raise?
- **Learning experience.** If appropriate, describe what you learned during the course of the project.

Keep in mind that the portfolio itself is a communication project, so be sure to apply everything you'll learn in this course about effective communication and good design.

Assume that potential employers will find your e-portfolio site (even if you don't tell them about it), so don't include anything that could come back to haunt you. Also, if you have anything embarrassing on Facebook, Twitter, or any other social networking site, remove it immediately.

To get started, first check with the career center at your college; many schools offer e-portfolio systems for their students. (Some schools now require e-portfolios, so you may already be building one.) You can also find plenty of advice online; search for "e-portfolio," "student portfolio," or "professional portfolio."

## BUILDING YOUR PERSONAL BRAND

Products and companies have brands that represent collections of certain attributes, such as the safety emphasis of Volvo cars, the performance emphasis of BMW, or the luxury emphasis of Cadillac. Similarly, when people who know you think about you, they have a particular set of qualities in mind based on your professionalism, your priorities, and the various skills and attributes you have developed over the years. Perhaps without even being conscious of it, you have created a **personal brand** for yourself.

As you plan the next stage of your career, start managing your personal brand deliberately. Branding specialist Mohammed Al-Taee defines personal branding succinctly as "a way of clarifying and communicating what makes you different and special."[9]

You will have multiple opportunities to plan and refine your personal brand during this course. For example, Chapter 6 offers tips on business applications of social media, which are key to personal branding, and Chapters 13 and 14 guide you through the process of creating a résumé, building your network, and presenting yourself in interviews. To get you started, here are the basics of a successful personal branding strategy:[10]

- **Figure out the "story of you."** Simply put, where have you been in life, and where are you going? Every good story has dramatic tension that pulls readers in and makes them wonder what will happen next. Where is your story going next? Chapter 13 offers more on this personal brand-building approach.
- **Clarify your professional theme.** Volvos, BMWs, and Cadillacs can all get you from Point A to Point B in safety, comfort, and style—but each brand emphasizes some attributes more than others to create a specific image in the minds of potential buyers. Similarly, you want to be seen as something more than just an accountant, a supervisor, a salesperson. What will your theme be? Brilliant strategist? Hard-nosed, get-it-done tactician? Technical guru? Problem solver? Creative genius? Inspirational leader?
- **Reach out and connect.** Major corporations spread the word about their brands with multimillion-dollar advertising campaigns. You can promote your brand for free or close to it. The secret is networking, which you'll learn more about in Chapter 13. You build your brand by connecting with like-minded people, sharing information, demonstrating skills and knowledge, and helping others succeed.
- **Deliver on your brand's promise—every time, all the time.** When you promote a brand, you make a promise—a promise that whoever buys that brand will get the benefits you are promoting. All of this planning and communication is of no value if you fail to deliver on the promises your branding efforts make. Conversely, when you deliver quality results time after time, your talents and professionalism will speak for you.

## USING ALL THE JOB-SEARCH TOOLS AT YOUR DISPOSAL

As a final note, be sure to use all the job-search tools and resources available to you. For example, many companies now offer mobile apps that give you a feel for what it's like to work there and that let you search for job openings. A variety of apps and websites can help you find jobs, practice interviewing, and build your professional network.

We wish you great success in this course and in your career!

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# PART 1 Business Communication Foundations



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# 1 Professional Communication in Today's Digital, Social, Mobile World

## LEARNING OBJECTIVES

After studying this chapter, you will be able to

1. Define *communication*, and explain the importance of effective business communication
2. Explain what it means to communicate as a professional in a business context
3. Describe the communication process model, and explain how social media are changing the nature of business communication
4. Outline the challenges and opportunities of mobile communication in business
5. Define *ethics*, explain the difference between an ethical dilemma and an ethical lapse, and list six guidelines for making ethical communication choices
6. Explain how cultural diversity affects business communication, and describe the steps you can take to communicate more effectively across cultural boundaries
7. List four general guidelines for using communication technology effectively



## Communication Matters . . .

"Make no mistake, in the technology lollapalooza of the past decade, digital and social media are merely the warm-up acts to the blockbuster headliner that is mobile."[1]
—Christina Kerley, marketing strategist and speaker

Christina Kerley's observation about the staggering impact of mobile technologies points to an intriguing truth: Business in general and business communication in particular are in a heady state of change. These changes bring opportunities and challenges, with new ways to connect with customers and colleagues but an endless race to keep up with technological advances and shifts in consumer behavior. This course will help you develop as an effective communicator in today's dynamic business environment—and no matter what career path you choose, nothing will help your career more than having solid communication skills.

Tetra Images/Alamy

The mobile revolution is one of the most important developments in the history of business communication.

# Understanding Why Communication Matters

**1 LEARNING OBJECTIVE**
Define *communication*, and explain the importance of effective business communication.

**Communication** is the process of transferring information and meaning between *senders* and *receivers*, using one or more print, oral, visual, or digital media. The essence of communication is sharing—providing data, information, insights, and inspiration in an exchange that benefits both you and the people with whom you are communicating.[2] As Figure 1.1 indicates, this sharing can happen in a variety of ways, including a simple and successful transfer of information, a negotiation in which the sender and receiver arrive at an agreed-upon meaning, and unsuccessful attempts in which the receiver creates a different message than the one the sender intended.

You will invest a lot of time and energy in this course developing your communication skills, so it's fair to ask whether it will be worthwhile. This section outlines the many ways in which good communication skills are critical for your career and for any company you join.

## COMMUNICATION IS IMPORTANT TO YOUR CAREER

Ambition and great ideas aren't enough; you need to be able to communicate with people in order to succeed in business.

No matter what career path you pursue, communication skills will be essential to your success at every stage. You can have the greatest ideas in the world, but they're no good to your company or your career if you can't express them clearly and persuasively. Some jobs, such as sales and customer support, are primarily about communicating. In fields such as engineering or finance, you often need to share complex ideas with executives, customers, and colleagues,

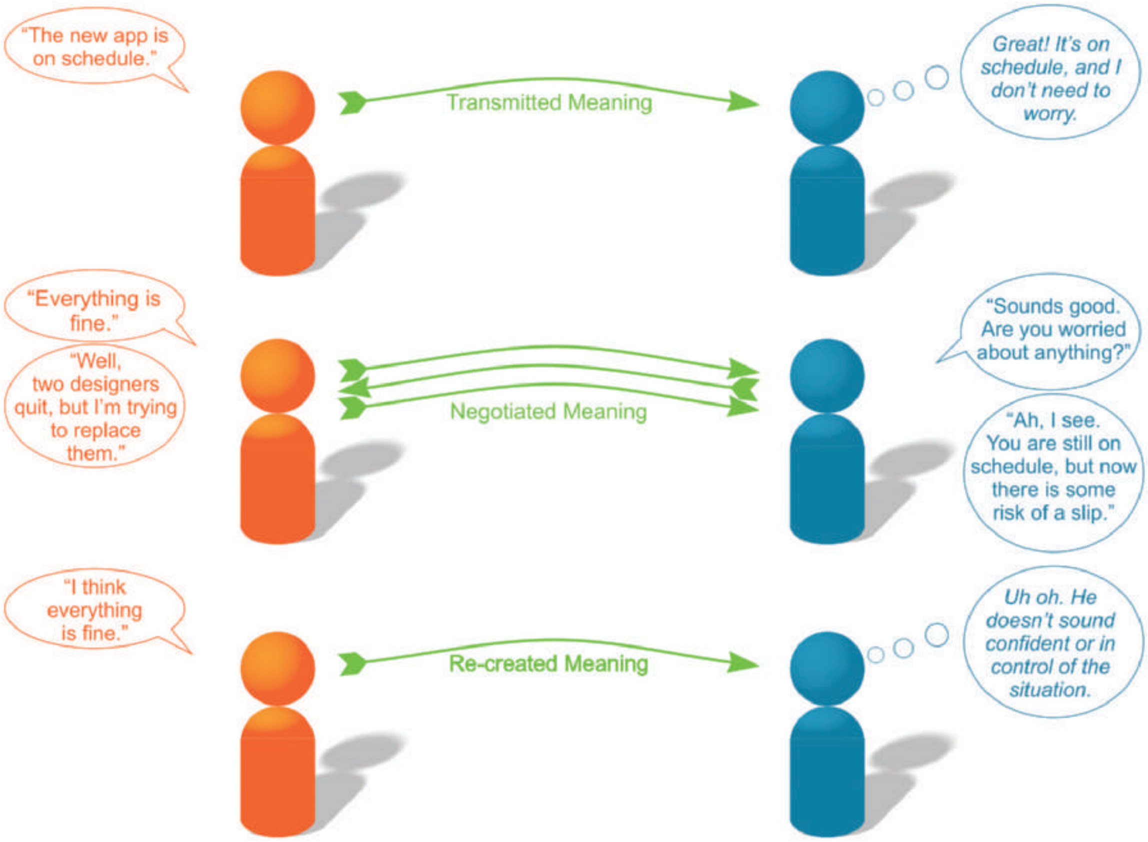


**Figure 1.1 Sharing Information**
These three exchanges between a software project manager (left) and his boss (right) illustrate the variety of ways in which information is shared between senders and receivers. In the top exchange, the sender's meaning is transmitted intact to the receiver, who accepts what the sender says at face value. In the middle exchange, the sender and receiver negotiate the meaning by discussing the situation. The negotiated meaning is that everything is fine *so far*, but the risk of a schedule slip is now higher than it was before. In the bottom exchange, the receiver has a negative emotional reaction to the word "think" and as a result creates her own meaning—that everything probably *is not* fine, in spite of what the sender says.

and your ability to connect with people outside your field can be as important as your technical expertise. If you have the entrepreneurial urge, you will need to communicate with a wide range of audiences, from investors, bankers, and government regulators to employees, customers, and business partners.

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**Check out the cutting edge of business communication**

This Pinterest board created by the authors highlights some of the most important changes taking place in the field of business communication. Go to **http://real-timeupdates.com/bce7**. Under "Students," click on "Learn More."

The changing nature of employment is putting new pressure on communication skills, too. Many companies now supplement their permanent workforces with independent contractors who are brought on for a short period or even just a single project. Chances are you will spend some of your career as one of these independent freelancers, working without the support network that an established company environment provides. You will have to "sell yourself" into each new contract, communicate successfully in a wide range of work situations, and take full responsibility for your career growth and success.

If you launch a company or move into an executive role in an existing organization, you can expect communication to consume the majority of your time. Top executives spend most of their workdays communicating, and businesspeople who can't communicate well don't stand much chance of reaching the top.

Improving your communication skills could be the single most important thing you do for your career.

In fact, improving your communication skills may be the single most important step you can take in your career. The world is full of good marketing strategists, good accountants, good engineers, and good attorneys—but it is not full of good communicators. View this as an opportunity to stand out from your competition in the job market.

Employers sometimes express frustration at the poor communication skills of many employees—particularly recent college graduates who haven't yet learned how to adapt their communication styles to a professional business environment.[3] If you learn to write well, speak well, listen well, and recognize the appropriate way to communicate in any situation, you'll gain a major advantage that will serve you throughout your career.[4]

This course teaches you how to send and receive information more effectively and helps you improve your communication skills through practice in an environment that provides honest, constructive criticism. You will discover how to collaborate in teams, listen effectively, master nonverbal communication skills, and participate in productive meetings. You'll learn about communicating across cultural boundaries. You'll learn a three-step process that will help you write effective business messages, and you'll get specific tips for crafting a variety of business messages using a wide range of media, from social networks to blogs to online presentations. Develop these skills, and you'll start your business career with a clear competitive advantage.

## COMMUNICATION IS IMPORTANT TO YOUR COMPANY

Aside from the personal benefits, communication should be important to you because it is important to your company. Effective communication helps businesses in numerous ways. It provides[5]

Effective communication delivers a variety of important benefits.

- Closer ties with important communities in the marketplace
- Opportunities to influence conversations, perceptions, and trends
- Increased productivity and faster problem solving
- Better financial results and higher return for investors
- Earlier warning of potential problems, from rising business costs to critical safety issues
- Stronger decision making based on timely, reliable information
- Clearer and more persuasive marketing messages
- Greater employee engagement with their work, leading to higher employee satisfaction and lower employee turnover

## WHAT MAKES BUSINESS COMMUNICATION EFFECTIVE?

Effective communication strengthens the connections between a company and all of its **stakeholders**, those groups affected in some way by the company's actions: customers, employees, shareholders, suppliers, neighbors, the community, the nation, and the world as a whole.[6] To make your communication efforts as effective as possible, focus on making them practical, factual, concise, clear, and persuasive:

Effective messages are *practical*, *factual*, *concise*, *clear*, and *persuasive*.

- **Provide practical information.** Give recipients useful information, whether it's to help them perform a desired action or understand a new company policy.
- **Give facts rather than vague impressions.** Use concrete language, specific detail, and information that is clear, convincing, accurate, and ethical. Even when an opinion is called for, present compelling evidence to support your conclusion.
- **Present information in a concise, efficient manner.** Concise messages show respect for people's time, and they increase the chances of a positive response.
- **Clarify expectations and responsibilities.** Craft messages to generate a specific response from a specific audience. When appropriate, clearly state what you expect from audience members or what you can do for them.
- **Offer compelling, persuasive arguments and recommendations.** Show your readers precisely how they will benefit by responding the way you want them to respond to your message.

Keep these five characteristics in mind as you review the poor and improved versions of the message in Figure 1.2.

## Communicating as a Professional

2 LEARNING OBJECTIVE
Explain what it means to communicate as a professional in a business context.

You've been communicating your entire life, of course, but if you don't have a lot of work experience yet, meeting the expectations of a professional environment might require some adjustment. A good place to start is to consider what it means to be a professional. **Professionalism** is the quality of performing at a high level and conducting oneself with purpose and pride. It means doing more than putting in the hours and collecting a paycheck; true professionals go beyond minimum expectations and commit to making meaningful contributions. Professionalism can be broken down into six distinct traits: striving to excel, being dependable and accountable, being a team player, demonstrating a sense of etiquette, making ethical decisions, and maintaining a positive outlook (see Table 1.1).

Communication is an essential part of being a successful professional.

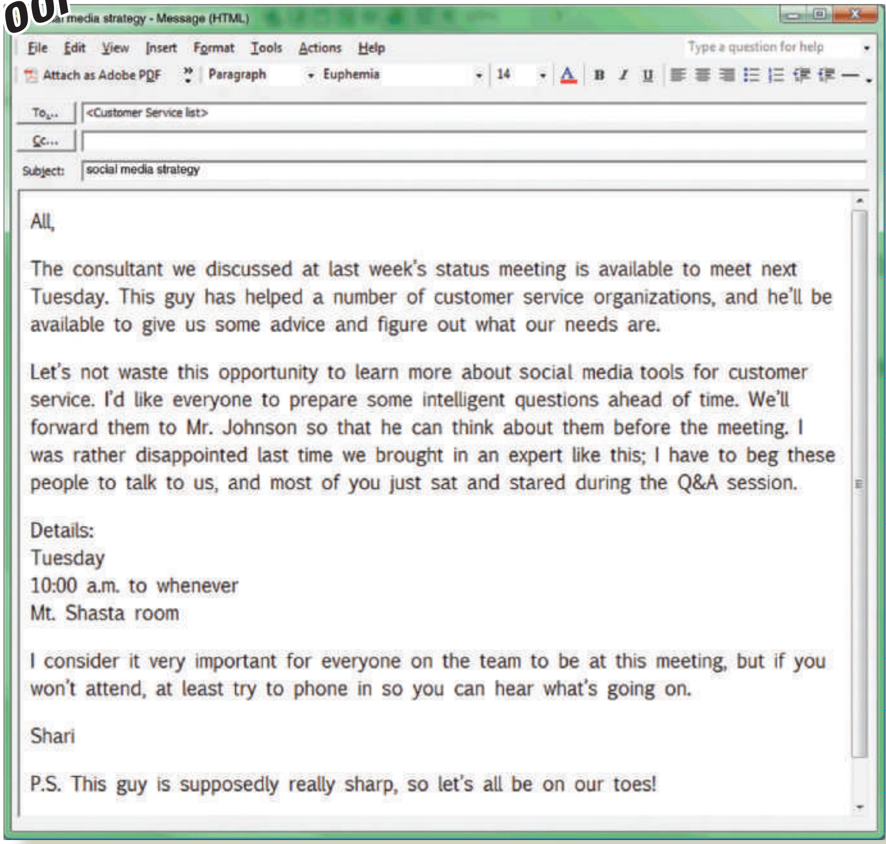
A key message to glean from Table 1.1 is how much these elements of professionalism depend on effective communication. For example, to be a team player, you have to be able to collaborate, resolve conflicts, and interact with a wide variety of personalities. Without strong communication skills, you won't be able to perform to your potential—and others won't recognize you as the professional you'd like to be.

This section offers a brief look at the skills that employers will expect you to have, the nature of communication in an organizational environment, and the importance of adopting an audience-centered approach.

TABLE 1.1 **Elements of Professionalism**

| Trait | What It Means |
|---|---|
| Be the best | • Pros strive to excel, to be the best they can be at everything they do.<br>• Excelling at every level is how pros build a great career. |
| Be dependable | • Pros keep their promises and meet their commitments.<br>• Pros learn from their mistakes and take responsibility for their errors. |
| Be a team player | • Pros know how to contribute to a larger cause.<br>• Team players make others around them better. |
| Be respectful | • Pros know that good business etiquette is a sign of respect for those around them.<br>• Respecting others is not only good etiquette, it's good for one's career. |
| Be ethical | • Responsible professionals strive to avoid ethical lapses.<br>• Pros weigh their options carefully when facing ethical dilemmas. |
| Be positive | • Successful people believe in what they're doing and in themselves.<br>• Pros don't complain about problems; they find them and fix them. |

Poor


Social media strategy - Message (HTML)

To... <Customer Service list>

Subject: social media strategy

All,

The consultant we discussed at last week's status meeting is available to meet next Tuesday. This guy has helped a number of customer service organizations, and he'll be available to give us some advice and figure out what our needs are.

Let's not waste this opportunity to learn more about social media tools for customer service. I'd like everyone to prepare some intelligent questions ahead of time. We'll forward them to Mr. Johnson so that he can think about them before the meeting. I was rather disappointed last time we brought in an expert like this; I have to beg these people to talk to us, and most of you just sat and stared during the Q&A session.

Details:
Tuesday
10:00 a.m. to whenever
Mt. Shasta room

I consider it very important for everyone on the team to be at this meeting, but if you won't attend, at least try to phone in so you can hear what's going on.

Shari

P.S. This guy is supposedly really sharp, so let's all be on our toes!

The vague subject line fails to alert people to the upcoming meeting.

The greeting is cold and off-putting.

The opening paragraph fails to provide necessary background information for anyone who missed the meeting.

A negative, accusatory tone here puts readers on the defensive.

This request for action fails to clarify who needs to do what by when.

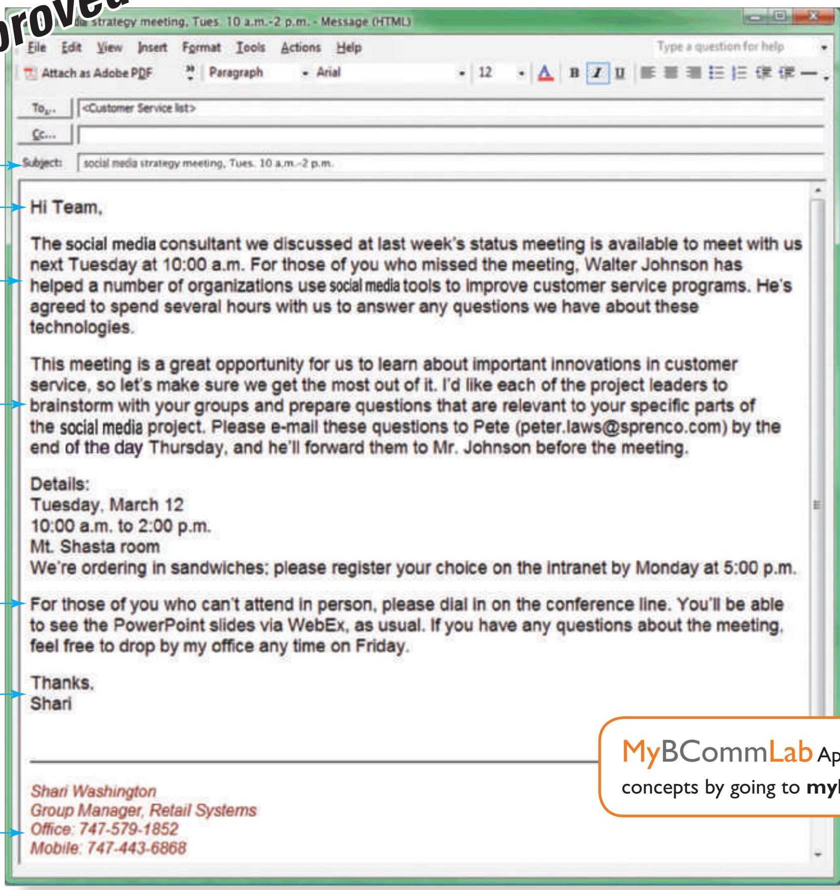
The meeting information includes the day, not the date, which could lead to confusion.

The wording here assumes that people who won't attend don't want to, which might not be true.

The lack of a closing (such as "thank you") contributes to the harsh, abrupt tone.

The writer fails to provide alternative contact information or invite questions about the meeting.

Improved


Social media strategy meeting, Tues. 10 a.m.-2 p.m. - Message (HTML)

To... <Customer Service list>

Subject: social media strategy meeting, Tues. 10 a.m.-2 p.m.

Hi Team,

The social media consultant we discussed at last week's status meeting is available to meet with us next Tuesday at 10:00 a.m. For those of you who missed the meeting, Walter Johnson has helped a number of organizations use social media tools to improve customer service programs. He's agreed to spend several hours with us to answer any questions we have about these technologies.

This meeting is a great opportunity for us to learn about important innovations in customer service, so let's make sure we get the most out of it. I'd like each of the project leaders to brainstorm with your groups and prepare questions that are relevant to your specific parts of the social media project. Please e-mail these questions to Pete (peter.laws@sprenco.com) by the end of the day Thursday, and he'll forward them to Mr. Johnson before the meeting.

Details:
Tuesday, March 12
10:00 a.m. to 2:00 p.m.
Mt. Shasta room
We're ordering in sandwiches; please register your choice on the intranet by Monday at 5:00 p.m.

For those of you who can't attend in person, please dial in on the conference line. You'll be able to see the PowerPoint slides via WebEx, as usual. If you have any questions about the meeting, feel free to drop by my office any time on Friday.

Thanks,
Shari

*Shari Washington*
*Group Manager, Retail Systems*
*Office: 747-579-1852*
*Mobile: 747-443-6868*

An informative subject line helps people grasp key content immediately.

The greeting is friendly without being too casual.

The opening paragraph fills in missing information so that everyone can grasp the importance of the message.

This paragraph emphasizes the importance of the meeting, and the request provides enough information to enable readers to respond.

The writer offers everyone a chance to participate, without making anyone feel guilty about not being able to attend in person. (*WebEx* is an online meeting system.) The closing paragraph also invites questions ahead of time so that they don't derail the meeting.

Like the greeting, the close has a warm and personal tone, without being too casual.

The *email signature* provides additional information and alternative contact options.

MyBCommLab Apply Figure 1.2's key concepts by going to **mybcommlab.com**

**Figure 1.2 Effective Professional Communication**
At first glance, the top email message looks like a reasonable attempt at communicating with the members of a project team. However, review the blue annotations to see just how many problems the message really has.

## UNDERSTANDING WHAT EMPLOYERS EXPECT FROM YOU

Employers expect you to have a broad set of communication skills, and you can practice all of these skills in this course.

Given the importance of communication in business, employers expect you to be competent at a wide range of communication tasks:[7]

- Recognizing information needs, using efficient search techniques to locate reliable sources of information, and using gathered information ethically; this collection of skills is often referred to as *digital information fluency*[8]
- Organizing ideas and information logically and completely
- Expressing ideas and information coherently and persuasively
- Actively listening to others
- Communicating effectively with people from diverse backgrounds and experiences
- Using communication technologies effectively and efficiently
- Following accepted standards of grammar, spelling, and other aspects of high-quality writing and speaking
- Communicating in a civilized manner that reflects contemporary expectations of business etiquette, even when dealing with indifferent or hostile audiences
- Communicating ethically, even when choices aren't crystal clear
- Managing your time wisely and using resources efficiently

You'll have the opportunity to practice these skills throughout this course, but don't stop there. Successful professionals continue to hone communication skills throughout their careers.

## COMMUNICATING IN AN ORGANIZATIONAL CONTEXT

You will need to adjust your communication habits to the more formal demands of business and the unique environment of your company.

In addition to having the proper skills, you need to learn how to apply those skills in the business environment, which can be quite different from your social and scholastic environments. Every company has a unique communication system that connects people within the organization and connects the organization to the outside world. The "system" in this broad sense is a complex combination of communication channels (such as the Internet and department meetings), company policies, organizational structure, and personal relationships.

To succeed in a job, you need to figure out how your company's system operates and how to use it to gather information you need and to share information you want others to have. For example, one company might rely heavily on instant messaging, social networks, and blogs that are used in an open, conversational way by everyone in the company. In contrast, another company might use a more rigid, formal approach in which information and instructions are passed down from top managers and employees are expected to follow the "chain of command" when seeking or distributing information.

## ADOPTING AN AUDIENCE-CENTERED APPROACH

Focus on the needs of your audiences to make your messages more effective.

Successful business professionals take an **audience-centered approach** to their communication, meaning that they focus on understanding and meeting the needs of their readers and listeners. Providing the information your audiences need is obviously an important part of this approach, but it also involves such elements as your ability to listen, your style of writing and speaking, and your ability to maintain positive working relationships. You'll have the chance to explore all these aspects throughout this course.

Respect, courtesy, and common sense will help you avoid etiquette mistakes.

An important element of audience-centered communication is **etiquette**, the expected norms of behavior in a particular situation. In today's hectic, competitive world, the notion of etiquette might seem outdated and unimportant. Some people might even consider such "rules" a threat to their individual freedom of expression.[9] However, the way you conduct yourself can have a profound influence on your company's success and your career. When executives hire and promote you, they expect your behavior to protect the company's reputation. The more you understand such expectations, the better chance you have of avoiding career-damaging mistakes. The principles of etiquette discussed in Chapter 2 will help you communicate with an audience-centered approach in a variety of business settings.

# Exploring the Communication Process

Even with the best intentions, communication efforts can fail. Fortunately, by understanding communication as a process with distinct steps, you can improve the odds that your messages will reach their intended audiences and produce their intended effects. This section explores the communication process in two stages: first by following a message from one sender to one receiver in the basic communication model, and then by expanding on that approach with multiple messages and participants in the social communication model.

3 LEARNING OBJECTIVE
Describe the communication process model, and explain how social media are changing the nature of business communication.

## THE BASIC COMMUNICATION MODEL

Many variations of the communication process model exist, but these eight steps provide a practical overview (see Figure 1.3):

The communication process starts with a sender having an idea and then encoding the idea into a message that can be transferred to a receiver.

1. **The sender has an idea.** Whether a communication effort will ultimately be effective starts right here and depends on the nature of the idea and the motivation for sending it. For example, if your motivation is to offer a solution to a problem, you have a better chance of crafting a meaningful message than if your motivation is merely to complain about a problem.
2. **The sender encodes the idea as a message.** When someone puts an idea into a **message**, he or she is **encoding** it, or expressing it in words or images. Much of the focus of this course is on developing the skills needed to successfully encode your ideas into effective messages.
3. **The sender produces the message in a transmittable medium.** With the appropriate message to express an idea, the sender now needs a **communication medium** to present that message to the intended audience. To update your boss on the status of a project, for instance, you might have a dozen or more media choices, from a phone call to an instant message to a slideshow presentation.
4. **The sender transmits the message through a channel.** Just as technology continues to increase the number of media options, it also continues to provide new **communication channels** senders can use to transmit their messages. The distinction between medium and channel can get a bit murky, but think of the medium as the *form* a message takes (such as a Twitter update) and the channel as the system used to *deliver* the message (such as a mobile phone).
5. **The audience receives the message.** If the channel functions properly, the message reaches its intended audience. However, mere arrival is not enough. For a message to truly be received, the recipient has to *sense* the presence of a message, *select* it from all the other messages clamoring for attention, and *perceive* it as an actual message (as opposed to random noise).[10]
6. **The receiver decodes the message.** After a message is received, the receiver needs to extract the idea from the message, a step known as **decoding**. Even well-crafted, well-intentioned communication efforts can fail at this stage because extracting meaning is

Decoding is a complex process; receivers often extract different meanings from messages than the meanings senders intended.

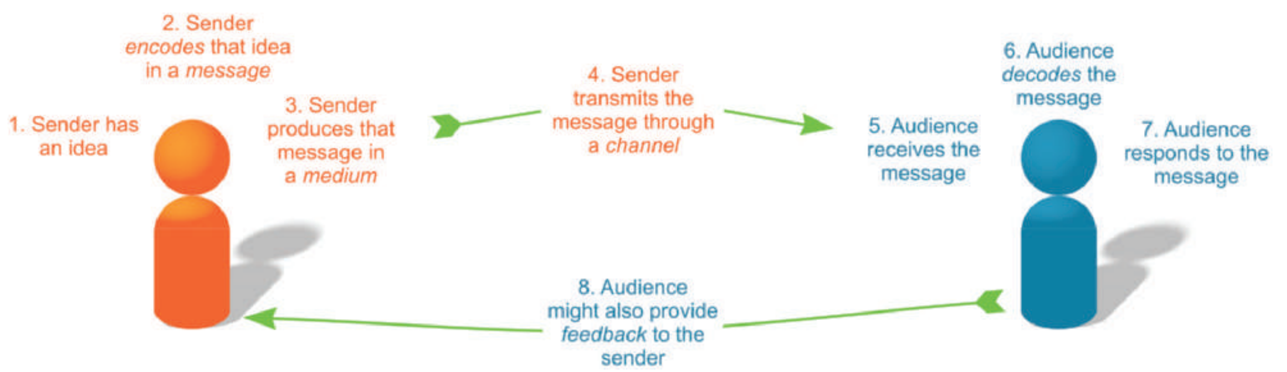



**Figure 1.3 The Basic Communication Process**
This eight-step model is a simplified view of how communication works in real life; understanding this basic model is vital to improving your communication skills.

a highly personal process that is influenced by culture, experience, learning and thinking styles, hopes, fears, and even temporary moods. As you saw in Figure 1.1, receivers sometimes decode the same meaning the recipient intended, but sometimes they can decode—or re-create—entirely different meanings. Moreover, audiences tend to extract the meaning they expect to get from a message, even if it's the opposite of what the sender intended.[11]

7. **The receiver responds to the message.** In most instances, senders want to accomplish more than simply delivering information. They often want receivers to respond in particular ways, whether it's to invest millions of dollars in a new business venture or to accept management's explanation for why the company can't afford to give employee bonuses this year. Whether a receiver responds as the sender hopes depends on the receiver (a) *remembering* the message long enough to act on it, (b) being *able* to act on it, and (c) being *motivated* to respond.
8. **The receiver provides feedback.** If a mechanism is available for them to do so, receivers can "close the loop" in the communication process by giving the sender **feedback** that helps the sender evaluate the effectiveness of the communication effort. Feedback can be verbal (using written or spoken words), nonverbal (using gestures, facial expressions, or other signals), or both. Just like the original message, however, this feedback from the receiver also needs to be decoded carefully. A smile, for example, can have many different meanings.

Considering the complexity of this process—and the barriers and distractions that often stand between sender and receiver—it should come as no surprise that communication efforts frequently fail to achieve the sender's objective. Fortunately, the better you understand the process, the more successful you'll be.

## THE SOCIAL COMMUNICATION MODEL

The basic model presented in Figure 1.3 illustrates how a single idea moves from one sender to one receiver. In a larger sense, it also helps represent the traditional model of much business communication, which was primarily defined by a *publishing* or *broadcasting* mindset. Externally, a company issued carefully scripted messages to a mass audience that often had few options for responding to those messages or initiating messages of their own. Customers and other interested parties had few ways to connect with one another to ask questions, share information, or offer support. Internally, communication tended to follow the same "we talk, you listen" model, with upper managers issuing directives to lower-level supervisors and employees.

The social communication model is interactive, conversational, and usually open to all who wish to participate.

However, in recent years, a variety of technologies have enabled and inspired a new approach to business communication. In contrast to the publishing mindset, this **social communication model** is interactive, conversational, and usually open to all who wish to participate. Audience members are no longer passive recipients of messages but active participants in a conversation. Social media have given customers and other stakeholders a voice they did not have in the past. And businesses are listening to that voice. In fact, one of the most common uses of social media among U.S. businesses is monitoring online discussions about a company and its brands.[12] Inside companies, social media make it easier for employees to voice concerns and frustrations, increasing the chances that managers will address problems that are getting in the way of people doing their jobs.[13]

Instead of transmitting a fixed message, a sender in a social media environment initiates a conversation by sharing valuable information. This information is often revised and reshaped by the web of participants as they share it and comment on it. People can add to it or take pieces from it, depending on their needs and interests.

Just as *Web 2.0* signified the second generation of World Wide Web technologies (blogs, wikis, podcasts, and other social media tools you'll read about in Chapter 6), *Business Communication 2.0* is a convenient label for this approach to business communication. Figure 1.4 lists the significant differences between traditional and social models of business communication.

Social media tools present some potential disadvantages that managers and employees need to consider.

The social communication model offers many advantages, but it has a number of disadvantages as well. Potential problems include information overload, fragmented attention,

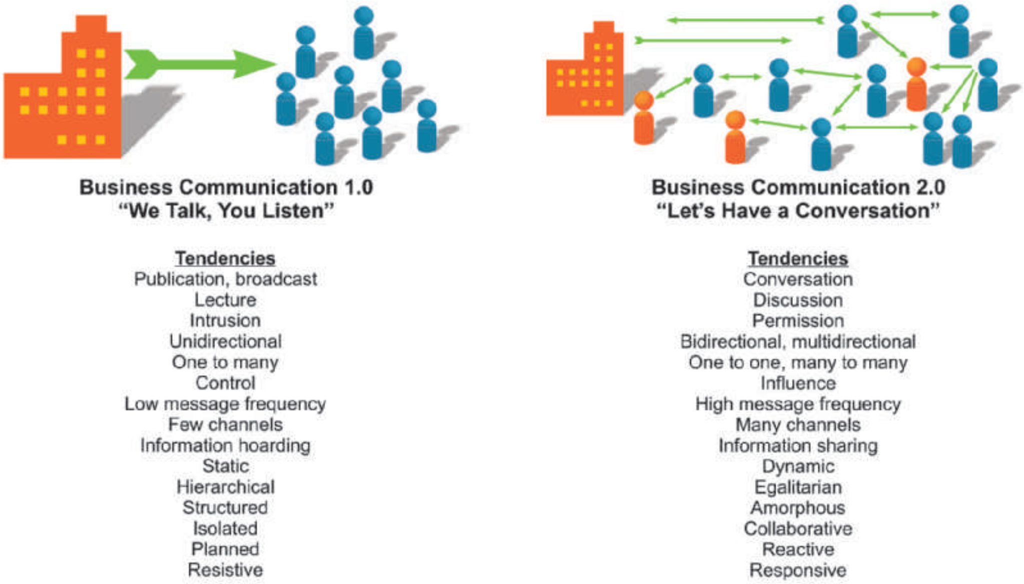



**Figure 1.4 Business Communication: 1.0 Versus 2.0**
Business Communication 2.0 differs from conventional communication strategies and practices in a number of significant ways. You're probably already an accomplished user of many new-media tools, and this experience will help you on the job.

information security risks, distractions that hurt productivity, the need to monitor and respond to numerous conversational threads, and blurring of the line between personal and professional lives, which can make it difficult for people to disconnect from work.[14]

Of course, no company, no matter how enthusiastically it embraces the social communication model, is going to be run as a club in which everyone has a say in every business matter. Instead, a hybrid approach is emerging in which some communications (such as strategic plans and policy documents) follow the traditional approach, while others (such as project management updates and customer support messages) follow the social model.

You can learn more about business uses of social media in Chapter 6.

## The Mobile Revolution

4 LEARNING OBJECTIVE
Outline the challenges and opportunities of mobile communication in business.

As much of a game-changer as social media have been, some experts predict that mobile communication will change the nature of business and business communication even more. Venture capitalist Joe Schoendorf says that "mobile is the most disruptive technology that I have seen in 48 years in Silicon Valley."[15] Researcher Maribel Lopez calls mobile "the biggest technology shift since the Internet."[16] This section offers a high-level view of the mobile revolution, and you'll see coverage of specific topics integrated throughout the book, in everything from collaborative writing and research to presentations and job search strategies.

### THE RISE OF MOBILE AS A COMMUNICATION PLATFORM

Mobile devices are rapidly taking over as the primary communication platform for many business professionals.

Whether it's emailing, social networking, watching video, or doing research, the percentage of communication and media consumption performed on mobile devices continues to grow. For millions of people around the world, a mobile device is their primary, if not only, way to access the Internet. Globally, roughly 80 percent of Internet users access the web at least some of the time with a mobile device.[17]

Mobile has become the primary communication tool for many business professionals, including a majority of executives under age 40.[18] Email and web browsing rank first and second in terms of the most common nonvoice uses of smartphones, and more email messages are now opened on mobile devices than on PCs.[19] Roughly half of U.S. consumers use

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**The mobile revolution by the numbers**

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a mobile device exclusively for their online search needs, and many online activities that eventually migrate to a PC screen start out on a mobile screen.[20] For many people, the fact that a smartphone can make phone calls is practically a secondary consideration; data traffic from mobile devices far outstrips voice traffic.[21]

Moreover, mobile phones—particularly smartphones—have become intensely personal devices in ways that PCs never did. For many users, the connection is so close they can feel a sense of panic when they don't have frequent access to their phones.[22] When people are closely connected to their phones, day and night, they are more closely connected to all the information sources, conversations, and networks that those phones can connect to. As result, mobile connectivity can start to resemble a continuous stream of conversations that never quite end, which influences the way businesses need to interact with their stakeholders. If *wearable technologies* such as Google Glass become mainstream devices, they will contribute even more to this shift in behaviors (see Figure 1.5).

The parallels between social media and mobile communication are striking: Both sets of technologies change the nature of communication, alter the relationships between senders and receivers, create opportunities as well as challenges, and force business professionals to hone new skills. In fact, much of the rise in social communication can be attributed to the connectivity made possible by mobile devices. Companies that work to understand and embrace mobile, both internally and externally, stand the best chance of capitalizing on this monumental shift in the way people communicate.

## HOW MOBILE TECHNOLOGIES ARE CHANGING BUSINESS COMMUNICATION

**MOBILE APPS**
WhatsApp lets you send and receive messages, videos, and other content via your phone's Internet connection.

The rise of mobile communication has some obvious implications, such as the need for websites to be mobile friendly. If you've ever tried to browse a conventional website on a tiny screen or fill in complicated online forms using the keypad on your phone, you know how frustrating the experience can be. Increasingly, users expect websites to be mobile friendly, and they're likely to avoid sites that aren't optimized for mobile.[23] As mobile access

**Figure 1.5 The Influence of Mobile Technology on Business Communication**
When people are connected to information sources for most of their waking hours, either through a mobile device or wearable technology, the communication experience can start to resemble an endless conversation.
*Source:* Sergio Azenha/Alamy.

overtakes computer-based access, some companies now take a *mobile-first* approach, in which websites are designed for optimum viewing on smartphones and tablets.[24] Another successful approach is creating mobile apps that offer a more interactive and mobile-friendly experience than a conventional website can offer.

However, device size and portability are only the most obvious changes. Just as with social media, the changes brought about by mobile go far deeper than the technology itself. Mobile changes the way people communicate, which has profound implications for virtually every aspect of business communication.

Social media pioneer Nicco Mele coined the term *radical connectivity* to describe "the breathtaking ability to send vast amounts of data instantly, constantly, and globally."[25] Mobile plays a major and ever-expanding role in this phenomenon by keeping people connected 24/7, wherever they may be. People who've grown up with mobile communication technology expect to have immediate access to information and the ability to stay connected to their various social and business networks.[26]

People who grew up with mobile phones often expect to have the same level of connectivity as customers and as employees.

Here are the most significant ways mobile technology is changing the practice of business communication:

- Constant connectivity is a mixed blessing. As with social media, mobile connectivity can blur the boundaries between personal and professional time and space, preventing people from fully disengaging from work during personal and family time. On the other hand, it can give employees more flexibility to meet their personal and professional obligations.[27] In this regard, mobile plays an important role in efforts to reduce operating costs through telecommuting and other nontraditional work models.[28]
- The physical layouts of mobile devices present challenges for creating and consuming content, whether it's typing an email message or watching a video. As you'll read in Chapter 6, for example, email messages need to be written and formatted differently to make them easier to read on mobile devices.
- Mobile users are often multitasking—roughly half of mobile phone usage happens while people are walking, for instance—so they can't give full attention to the information on their screens.[29] Moreover, mobile use often occurs in environments with multiple distractions and barriers to successful communication (see Figure 1.6).
- Mobile communication, particularly text messaging, has put pressure on traditional standards of grammar, punctuation, and writing in general. Chapter 4 has more on this topic.

Constant connectivity is a mixed blessing; you can work from anywhere at anytime, but it's more difficult to disconnect from work and recharge yourself.

**Figure 1.6 The Mobile Audience: Distracted and Multitasking**
If the intended recipients of your business messages will view your messages on mobile devices, chances are you'll be fighting for their attention.
*Source:* Maridav/Shutterstock.

- Mobile devices can serve as sensory and cognitive extensions.[30] For example, they can help people experience more of their environment (such as augmented reality apps that superimpose information on a live camera view) and have instant access to information without relying on faulty and limited human memory. The addition of *location-aware content*, such as facility maps and property information, enhances the mobile experience.
- Mobile devices create a host of security and privacy concerns, for end users and corporate technology managers alike.[31] Companies are wrestling with the "bring your own device" or "BYOD" phenomenon, in which employees want to be able to access company networks and files with their personal smartphones and tablets, both in the office and away from it. However, these devices don't always have the rigorous security controls that corporate networks need, and users don't always use the devices in secure ways.
- Mobile tools can enhance productivity and collaboration by making it easier for employees to stay connected and giving them access to information and work tasks during forced gaps in the workday or while traveling.[32]
- Mobile apps can assist in a wide variety of business tasks, from research to presentations (see Figure 1.7).[33]
- Mobile connectivity can accelerate decision making and problem solving by putting the right information in the hands of the right people at the right time. For example, if the people in a decision-making meeting need more information, they can do the necessary research on the spot.[34] Mobile communication also makes it easier to quickly tap into pockets of expertise within a company.[35] Customer service can be improved by making sure technicians and other workers always have the information they need right at hand.[36] Companies can also respond and communicate faster during crises.[37]

Collaboration and problem solving are two key areas where mobile connectivity can boost productivity by enabling real-time interaction and access to vital information.


**Figure 1.7 Mobile Communication: Opportunities and Challenges**
From 24/7 connectivity to business-oriented apps that let professionals perform work tasks on the go (such as making notes for a presentation, as shown here), mobile technology is revolutionizing business communication.
*Source:* Microsoft Office 365 app.

- With interactivity designed to take advantage of the capabilities of mobile devices (including cameras, accelerometers, compasses, and GPS), companies can create more engaging experiences for customers and other users.[38]

The mobile revolution complicates business communication in some ways, but it can enhance communication in many ways if done thoughtfully. You'll read more about mobile in the chapters ahead.

## Committing to Ethical Communication

**Ethics** are the accepted principles of conduct that govern behavior within a society. Ethical behavior is a companywide concern, but because communication efforts are the public face of a company, they are subjected to particularly rigorous scrutiny from regulators, legislators, investors, consumer groups, environmental groups, labor organizations, and anyone else affected by business activities. **Ethical communication** includes all relevant information, is true in every sense, and is not deceptive in any way. In contrast, unethical communication can distort the truth or manipulate audiences in a variety of ways. Examples of unethical communication include[39]

5 LEARNING OBJECTIVE
Define *ethics*, explain the difference between an ethical dilemma and an ethical lapse, and list six guidelines for making ethical communication choices.

Ethical communication avoids deception and provides the information audiences need.

- **Plagiarism.** Plagiarism is presenting someone else's words or other creative product as your own. Note that plagiarism can also be illegal if it violates a **copyright**, which is a form of legal protection for the expression of creative ideas.[40]
- **Omitting essential information.** Information is essential if your audience needs it to make an intelligent, objective decision.
- **Selective misquoting.** Distorting or hiding the true intent of someone else's words is unethical.
- **Misrepresenting numbers.** Statistics and other data can be unethically manipulated by increasing or decreasing numbers, exaggerating, altering statistics, or omitting numeric data.
- **Distorting visuals.** Images can be manipulated in unethical ways, such as making a product seem bigger than it really is or changing the scale of graphs and charts to exaggerate or conceal differences.
- **Failing to respect privacy or information security needs.** Failing to respect the privacy of others or failing to adequately protect information entrusted to your care can also be considered unethical (and is sometimes illegal).

The widespread use of social media has increased the attention given to the issue of **transparency**, which in this context refers to a sense of openness, of giving all participants in a conversation access to the information they need in order to accurately process the messages they are receiving.

Transparency involves giving audiences access to the information they need in order to make effective decisions.

In addition to the information itself, audiences deserve to know when they are being marketed to and who is behind the messages they read or hear. For example, with *stealth marketing*, companies recruit people to promote products to friends and other contacts in exchange for free samples or other rewards, without requiring them to disclose the true nature of the communication. Critics, including the U.S. Federal Trade Commission (FTC), assert that such techniques are deceptive because they don't give targets the opportunity to raise their instinctive defenses against the persuasive powers of marketing messages.[41]

Stealth marketing is considered unethical by some observers because it prevents consumers from making fully informed decisions.

Aside from ethical and legal concerns, trying to fool the public is simply bad for business. As LaSalle University communication professor Michael Smith puts it, "The public backlash can be long, deep, and damaging to a company's reputation."[42]

### DISTINGUISHING ETHICAL DILEMMAS FROM ETHICAL LAPSES

Some ethical questions are easy to recognize and resolve, but others are not. Deciding what is ethical in complex business situations is not always easy. An **ethical dilemma** involves choosing among alternatives that aren't clear-cut. Perhaps two conflicting alternatives are

If you must choose between two ethical alternatives, you are facing an ethical dilemma.

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**Social media disclosure guidelines that ensure transparency**

The Word of Mouth Marketing Association social media disclosure guide offers simple tips for avoiding ethical lapses. Go to **http://real-timeupdates.com/bce7**. Under "Students," click on "Learn More."

both ethical and valid, or perhaps the alternatives lie somewhere in the gray area between clearly right and clearly wrong. Every company has responsibilities to multiple groups of people inside and outside the firm, and those various groups often have competing interests. For instance, employees generally want higher wages and more benefits, but investors who have risked their money in the company want management to keep costs low so that profits are strong enough to drive up the stock price. Both sides have a valid ethical position.

If you choose an alternative that is unethical, you have committed an ethical lapse.

Unlike a dilemma, an **ethical lapse** is a clearly unethical choice. With both internal and external communication efforts, the pressure to produce results or justify decisions can make unethical communication a tempting choice. Telling a potential customer you can complete a project by a certain date when you know you can't is simply dishonest, even if you need the contract to save your career or your company. There is no ethical dilemma here.

### MAKING ETHICAL CHOICES

Responsible employers establish clear ethical guidelines for their employees to follow.

Ensuring ethical business communication requires three elements: ethical individuals, ethical company leadership, and the appropriate policies and structures to support ethical decision making.[43] Many companies establish an explicit ethics policy by using a written **code of ethics** to help employees determine what is acceptable. Showing employees that the company is serious about ethical behavior is also vital.

If company ethics policies don't cover a specific situation, you can ask yourself a number of questions in order to make an ethical choice.

Even the best codes and policies can't address every unique situation, however. If you find yourself in a situation in which the law or a code of ethics can't guide you, answer the following questions:[44]

- Have you defined the situation fairly and accurately?
- What is your intention in communicating this message?
- What impact will this message have on the people who receive it or who might be affected by it?
- Will the message achieve the greatest possible good while doing the least possible harm?
- Will the assumptions you've made change over time? That is, will a decision that seems ethical now seem unethical in the future?
- Are you comfortable with your decision? Would you be embarrassed if it were printed in tomorrow's newspaper or spread across the Internet? Think about a person you admire and ask yourself what he or she would think of your decision.

MOBILE APPS

The PRSA Ethics app is a mobile version of the Public Relations Society of America's code of ethics.

If you ever have doubts about the legal ramifications of a message you intend to distribute, ask for guidance from your company's legal department.

## Communicating in a World of Diversity

6 LEARNING OBJECTIVE
Explain how cultural diversity affects business communication, and describe the steps you can take to communicate more effectively across cultural boundaries.

Throughout your career, you will interact with people from a variety of cultures, people who differ in race, age, gender, sexual orientation, national and regional attitudes and beliefs, family structure, religion, native language, physical and cognitive abilities, life experience, and educational background. Although the concept is often narrowly framed in terms of ethnic background, a broader and more useful definition of **diversity** includes "all the characteristics and experiences that define each of us as individuals."[45] For example, the pharmaceutical company Merck (see Figure 1.8) identifies 19 separate dimensions of diversity in its discussions of workforce diversity, including military experience, parental status, marital status, and thinking style.[46] These characteristics and experiences can have a profound effect on the way businesspeople communicate.

This section looks at the advantages and challenges of a diverse workforce from a communication perspective, examines key differences among cultures, and offers advice for communicating across cultures.

Merck's top-line message about diversity acknowledges the strategic advantages available to companies that embrace diversity in their hiring and management practices.

Specific supporting points back up the high-level message about the company's commitment to embracing diversity in all facets of its business.

In addition to developing and supporting a diverse workforce, Merck works closely with a diverse base of suppliers to its various business units.


This diagram lists the 19 dimensions of diversity that Merck takes into account in its management philosophy.

Significant awards and recognitions let potential employees and business partners know that Merck is serious about inclusivity.

**Figure 1.8 Diversity at Merck**

The pharmaceutical company Merck approaches employee and supplier diversity as an opportunity and a strategy imperative.

*Source:* Courtesy of Merck, Global Communications, Reputation and Branding.

## THE ADVANTAGES AND CHALLENGES OF A DIVERSE WORKFORCE

Diverse workforces offer numerous benefits, but they pose some communication challenges as well.

Smart business leaders recognize the competitive advantages of a diverse workforce that offers a broader spectrum of viewpoints and ideas, helps companies understand and identify with diverse markets, and enables companies to benefit from a wider range of employee talents. "It just makes good business sense," says Gord Nixon, CEO of Royal Bank of Canada.[47] According to IBM executive Ron Glover, more-diverse teams tend to be more innovative over the long term than teams composed of people from the same culture.[48]

Cultural symbols, beliefs, attitudes, values, expectations, and norms for behavior influence communication.

For all their benefits, diverse workforces and markets do present some communication challenges, and understanding the effect of culture on communication is essential. **Culture** is a shared system of symbols, beliefs, attitudes, values, expectations, and norms for behavior. You are a member of several cultures, in fact, based on your national origin, religious beliefs, age, and other factors.

Culture influences the way people perceive the world and respond to others, which naturally affects the way they communicate as both senders and receivers. These influences operate on such a fundamental level that people often don't even recognize the influence of culture on their beliefs and behaviors.[49]

This subconscious effect of culture can create friction because it leads people to assume that everybody thinks and feels the way they do. For example, in a comparison of the 10 most important values in three cultures, people from the United States had no values in common with people from Japanese or Arab cultures.[50]

The first step to making sure cultural differences don't impede communication is recognizing key factors that distinguish one culture from another. **Cultural competency** is an appreciation for cultural differences that affect communication and the ability to adjust one's communication style to ensure that efforts to send and receive messages across cultural boundaries are successful. It requires a combination of attitude, knowledge, and skills.[51]

## KEY ASPECTS OF CULTURAL DIVERSITY

Improving your cultural sensitivity starts with recognizing the major ways in which cultures differ.

You don't need to become an expert in the details of every culture with which you do business, but you do need to attain a basic level of cultural proficiency to ensure successful communication.[52] You can start by recognizing and accommodating the differences described in the following sections. Be aware that this is an overview only, so some generalizations won't be accurate in every situation. Always consider the unique circumstances of each encounter when making communication decisions.

### Cultural Context

Cultural context plays a critical role in the communication process.

Every attempt at communication occurs within a **cultural context**, the pattern of physical cues, environmental stimuli, and implicit understanding that convey meaning between two members of the same culture. However, cultures around the world vary widely in the role that context plays in communication.

In high-context cultures, communication relies less on the explicit content of a message than on the context of the message.

In a **high-context culture**, people rely less on verbal communication and more on the context of nonverbal actions and environmental setting to convey meaning. For instance, a Chinese speaker expects the receiver to discover the essence of a message and uses indirectness and metaphor to provide a web of meaning.[53] The indirect style can be a source of confusion during discussions with people from low-context cultures, who are more accustomed to receiving direct answers. Also, in high-context cultures, the rules of everyday life are rarely explicit; instead, as individuals grow up, they learn how to recognize situational cues (such as gestures and tone of voice) and how to respond as expected.[54] The primary role of communication in high-context cultures is building relationships, not exchanging information.[55]

In low-context cultures, communication relies more on message content than on message context.

In a **low-context culture** such as the United States, people rely more on verbal communication and less on circumstances and cues to convey meaning. In such cultures, rules and expectations are usually spelled out through explicit statements such as "Please wait until I'm finished" or "You're welcome to browse."[56] The primary task of communication in low-context cultures is exchanging information.[57]

Contextual differences are apparent in the way businesspeople approach situations such as decision making, problem solving, negotiating, interaction among levels in the organizational hierarchy, and socializing outside the workplace.[58] For instance, in low-context cultures, businesspeople tend to focus on the results of the decisions they face, a reflection of the cultural emphasis on logic and progress. In comparison, higher-context cultures emphasize the means or the method by which a decision will be made. Building or protecting relationships can be as important as the facts and information used in making the decisions.[59] Consequently, negotiators working on business deals in such cultures may spend most of their time together building relationships rather than hammering out contractual details.

The distinctions between high and low context are generalizations, of course, but they are important to keep in mind as guidelines. Communication tactics that work well in a high-context culture may backfire in a low-context culture and vice versa.

### Legal and Ethical Differences

Members of different cultures sometimes have different views of what is ethical or even legal.

Cultural context influences legal and ethical behavior, which in turn can affect communication. For example, the meaning of business contracts can vary from culture to culture. While a manager from a U.S. company would tend to view a signed contract as the end of the negotiating process, with all the details hammered out, his or her counterpart in many Asian cultures might view the signed contract as an agreement to do business—and only then begin to negotiate the details of the deal.[60]

As you conduct business with colleagues and customers around the world, you'll find that legal systems and ethical standards differ from culture to culture. Making ethical choices across cultures can seem complicated, but you can keep your messages ethical by applying four basic principles:[61]

- Actively seek mutual ground.
- Send and receive messages without judgment.
- Send messages that are honest.
- Show respect for cultural differences.

Learn the four principles that will help you keep your intercultural messages ethical.

### Social Customs

Social behavior is guided by numerous rules, some of them formal and specifically articulated (table manners are a good example) and others more informal and learned over time (such as the comfortable standing distance between two speakers in an office). The combination of formal and informal rules influences the overall behavior of everyone in a society in areas such as manners, attitudes toward time, individual versus community values, attitudes toward status and wealth, respect for authority, and degrees of openness and inclusiveness. Understanding the nuances of social customs takes time and effort, but most businesspeople are happy to explain the habits and expectations of their culture. Plus, they will view your curiosity as a sign of respect.

Whether formal or informal, the rules governing social customs differ from culture to culture.

### Nonverbal Communication

Nonverbal communication (communicating without the use of words) is a vital part of the communication process. Factors ranging from facial expressions to style of dress can influence the way receivers decode messages, and the interpretation of nonverbal signals can vary widely from culture to culture. Gestures or clothing choices that you don't think twice about, for example, might seem inappropriate or even offensive to someone from another culture. You'll learn more about nonverbal communication in Chapter 2.

The meanings of gestures and other nonverbal signals can vary widely from culture to culture.

### Age Differences

In some cultures, youth is associated with strength, energy, possibilities, and freedom, while age is often associated with declining powers and a loss of respect and authority. In contrast, in cultures that value age and seniority, longevity earns respect and increasing power and freedom.

In addition to cultural values associated with various life stages, multiple generations in the workplace present another dimension of diversity. Each of these generations has been shaped by dramatically different world events, social trends, and technological advances, so it is not surprising that they often have different values, expectations, and communication habits. For instance, Generation Y workers (those born between 1981 and 1995) have a strong preference for communicating via short digital messages, but baby boomers (born between 1946 and 1964) and Generation X workers (1965 to 1980) sometimes find these brief messages abrupt and impersonal.[62]

Each generation can bring particular strengths to the workplace. For instance, older workers can offer broader experience, the benefits of important business relationships nurtured over many years, and high degrees of "practical intelligence"—the ability to solve complex, poorly defined problems.[63] However, gaining the benefits of having multiple generations in a workplace may require some accommodation on everyone's part because of differing habits and perspectives.

Age is an important aspect of culture, both in the way different age groups are treated in a culture and in the cultural differences between age groups.

### Gender Differences

Gender influences workplace communication in several important ways. First, the perception of men and women in business varies from culture to culture, and gender bias can range from overt discrimination to subtle and even unconscious beliefs.

Second, although the ratio of men and women in entry-level professional positions is roughly equal, the percentage of management roles held by men increases steadily the further one looks up the corporate ladder. This imbalance can significantly affect communication in such areas as mentoring, which is a vital development opportunity for lower

Perceptions of gender roles in business differ among cultures.

and middle managers who want to move into senior positions. In one recent survey, for example, some men in executive positions expressed reluctance to mentor women, partly because they find it easier to bond with other men and partly out of concerns over developing relationships that might look inappropriate.[64]

Third, evidence suggests that men and women tend to have somewhat different communication styles. Broadly speaking, men emphasize content and outcomes in their communication efforts, whereas women place a higher premium on relationship maintenance.[65] As one example, men are more likely than women to try to negotiate a pay raise. Moreover, according to research by Linda Babcock of Carnegie Mellon University, both men and women tend to accept this disparity, viewing the assertiveness as a positive quality in men but a negative quality in women. Changing these perceptions could go a long way toward improving communication and equity in the workplace.[66]

### Religious Differences

As workforce diversity broadens, more companies find themselves forced to address the issue of religion in the workplace.

As one of the most personal and influential aspects of life, religion brings potential for controversy and conflict in the workplace setting—as evidenced by a significant rise in the number of religious discrimination lawsuits in recent years.[67] Many employees believe they should be able to follow and express the tenets of their faith in the workplace. However, companies may need to accommodate employee behaviors that may conflict with each other and with the demands of operating the business. The situation is complicated, with no simple answers that apply to every situation. As more companies work to establish inclusive workplaces, you can expect to see this issue being discussed more often in the coming years.

### Ability Differences

Assistive technologies and other adaptations can help companies support the contribution of people with varying levels of physical and cognitive impairment.

People whose hearing, vision, cognitive ability, or physical ability to operate computers or other tools is impaired can be at a significant disadvantage in today's workplace. As with other elements of diversity, success starts with respect for individuals and sensitivity to differences. Employers can also invest in a variety of *assistive technologies* that help create a vital link for thousands of employees with disabilities, giving them opportunities to pursue a greater range of career paths and giving employers access to a broader base of talent.

## ADVICE FOR IMPROVING INTERCULTURAL COMMUNICATION

In any cross-cultural situation, you can communicate more effectively if you heed the following tips:[68]

Effective intercultural communication starts with efforts to avoid ethnocentrism and stereotyping.

- Avoid **ethnocentrism**, the tendency to judge all other groups according to the standards, behaviors, and customs of one's own group. When making such comparisons, people too often decide that their own group is superior.[69]
- Similarly, avoid **stereotyping**, or assigning a wide range of generalized—and often inaccurate—attributes to an individual on the basis of membership in a particular group, without considering the individual's unique characteristics.
- Don't automatically assume that others think, believe, or behave as you do.
- Accept differences in others without judging them.
- Learn how to communicate respect in various cultures.
- Tolerate ambiguity and control your frustration.
- Don't be distracted by superficial factors such as personal appearance.
- Recognize your own cultural biases.
- Be flexible and be prepared to change your habits and attitudes.
- Observe and learn; the more you know, the more effective you'll be.

Travel guidebooks are a great source of information about norms and customs in other countries. Also, check to see whether your library has online access to the CultureGrams database.

### Writing for Multilingual Audiences

Ideally, businesses can communicate with employees, customers, and other stakeholders in their native languages, and many companies invest a lot of time and money in translating print and online communication to achieve this. However, translation isn't always cost-effective or possible. To write effectively for people who may not be comfortable using your language, remember these tips (see Figure 1.9 on the next page):[70]

**REAL-TIME UPDATES**

LEARN MORE BY VIEWING THIS PRESENTATION

**A business-focused model for identifying cultural differences**

The Lewis Model of Culture is an intriguing way of recognizing different approaches to business. Go to **http://real-timeupdates.com/bce7**. Under "Students," click on "Learn More."

Tips for improving your intercultural writing include using plain language, avoiding slang, and using short sentences and short paragraphs.

- **Use plain language.** Use short, precise words that say exactly what you mean.
- **Avoid words with multiple meanings.** As much as possible, choose words that have only one obvious meaning in the context you're using them. For example, "assess" can mean to analyze a situation, but it can also mean to impose a penalty or a fee.
- **Be clear.** Rely on specific terms and concrete examples to explain your points.
- **Cite numbers carefully.** Use figures (such as 27) instead of spelling them out (twenty-seven).
- **Avoid slang and be careful with technical jargon and abbreviations.** Slang and other nonstandard usages can be difficult or impossible for your audience to translate.
- **Be brief.** Construct sentences that are short and simple.
- **Use short paragraphs.** Each paragraph should stick to one topic.
- **Use transitions generously.** Help readers follow your train of thought; you'll learn more about transitions in Chapter 4.

### Speaking with Multilingual Audiences

When speaking to people whose native language is not your own, you may find these tips helpful:

Tips for speaking with multilingual audiences include speaking clearly and slowly, looking for feedback, and listening carefully.

- **Speak clearly, simply, and relatively slowly.** Pronounce words clearly, stop at distinct punctuation points, and make one point at a time.
- **Look for feedback, but interpret it carefully.** Nods and smiles don't necessarily indicate understanding.
- **Rephrase if necessary.** If someone doesn't seem to understand you, rephrase using simpler words.
- **Clarify your meaning with repetition and examples.** Use concrete and specific examples to illustrate difficult or vague ideas.
- **Don't talk down to the other person.** Don't blame the listener for not understanding. Say, "Am I going too fast?" rather than "Is this too difficult for you?"
- **Learn important phrases in your audience's language.** Learning common greetings and a few simple phrases simplifies initial contact and shows respect.
- **Listen carefully and respectfully.** If you do not understand a comment, ask the person to repeat it.
- **Adapt your conversation style to the other person's.** For instance, if the other person appears to be direct and straightforward, follow suit.
- **Check frequently for comprehension.** After you make each point, pause to gauge the other person's comprehension before moving on.
- **Clarify what will happen next.** At the end of a conversation, be sure that you and the other person agree on what has been said and decided.

Finally, remember that oral communication can be more difficult for audiences because it happens in real time and in the presence of other people. In some situations, written communication will be more successful because it gives the recipient the opportunity to translate in private and at his or her own pace.

## Using Technology to Improve Business Communication

7 LEARNING OBJECTIVE

List four general guidelines for using communication technology effectively.

Today's businesses rely heavily on technology to facilitate the communication process. In fact, many of the technologies you might use in your personal life, from Facebook to Twitter to video games, are also used in business. The four-page photo essay

**Poor**

## Assessing the Office Merger: Bad, Bad, and Not Good

APRIL 22, 2015 BY CYNTHIA MARTIN LEAVE A COMMENT (EDIT)

When we folded the Broken Arrow office into the Tulsa headquarters last year, we anticipated some significant challenges during and after the consolidation. Closing a facility and combining two teams into one is never easy, but as I explained at the time, economic pressures—primarily the need to improve our all-important average profit per client metric—forced us to make a difficult decision.

I wish I could say that we hit this one out of the park. If one were to judge from the three most important indicators, we have not yet accomplished our goals. Our performance has actually declined in two of the three. The latest customer satisfaction survey shows a fifteen-percent increase in the number of customers who say they will consider other service providers when their current contracts expire. Employee satisfaction scores have also dropped since the offices were merged. Only seventy-two percent of employees rate their job satisfaction as "high" or "very high," compared to eighty-seven percent before the merger. The only measure of the three that has stayed steady is our average profit per client. While this might sound like good news in comparison to the other two, improving this variable was the primary reason for combining the offices in the first place.

I'll be blunt: This ain't gonna cut it, folks.

FILED UNDER: STRATEGIC PLANNING

The headline tries to be clever regarding the three factors discussed in the post, but the message is not clear.

"Folded" is an English word with multiple meanings; these multiple possibilities make translation more difficult and can lead to confusion.

Complicated sentences are difficult to translate and force readers to follow multiple ideas at once.

The idiomatic phrase "hit one out of the park" might not make sense to readers who aren't familiar with baseball.

Spelling out numbers instead of using numerals creates more work for readers.

Long paragraphs are visually intimidating and more difficult to process.

Nonstandard language ("ain't") and the idiomatic phrase "cut it" will confuse some readers.

**Improved**

## We Have Not Met Our Goals for the Office Merger

APRIL 22, 2015 BY CYNTHIA MARTIN LEAVE A COMMENT (EDIT)

When we merged the Broken Arrow office with the Tulsa headquarters last year, we knew the move would be challenging. Closing a facility and combining two teams is never easy, but economic pressures forced us to make a difficult decision.

Unfortunately, we have not met the three goals we had for the merger: improving customer satisfaction, improving employee satisfaction, and increasing the average profit per client. In fact, our performance has actually *declined* in two of the three areas:

- The latest customer satisfaction survey shows a 15-percent increase in the number of customers who say they will consider other service providers when their current contracts expire.
- Employee satisfaction has also dropped since the offices were merged. Only 72 percent of employees rate their job satisfaction as "high" or "very high," compared to 87 percent before the merger.
- The only indicator of the three that has remained steady is our average profit per client. While this might sound like good news in comparison to the other two, improving this variable was the primary reason for combining the offices.

Clearly, we need to take a closer look at this situation to see where we went wrong and where we can make improvements.

FILED UNDER: STRATEGIC PLANNING

The clear, direct headline leaves no question about the content of the message.

Simpler sentence structures are easier to translate and create fewer chances for misunderstanding.

Breaking the long paragraph into a brief introduction and three bullet points simplifies reading and makes it easy to find the key points.

Numerals are easier to read quickly than spelled-out quantities.

Standard English and plain language decrease the potential for confusion.

**Pointers for Writing for Multilingual Audiences**

- Use plain language.
- Be clear.
- Cite numbers carefully.
- Avoid slang and be careful with technical jargon and abbreviations.
- Be brief.
- Use short paragraphs.
- Use transitions generously.

MyBCommLab Apply Figure 1.9's key concepts by going to **mybcommlab.com**

**Figure 1.9 Writing for Multilingual Audiences**
In today's global and diversified work environment, chances are that many of your messages will be read by people whose native language is not English. Follow the guidelines on page 65 to help ensure successful communication. (Notice how following these guidelines makes the message easier for *everybody* to read, including native English speakers.)

"Powerful Tools for Communicating Effectively" (pages 68–71) offers an overview of the technologies that connect people in offices, factories, and other business settings.

The benefits of technology are not automatic, of course. To communicate effectively, you need to keep technology in perspective, use technological tools productively, guard against information overload, and disengage from the computer frequently to communicate in person.

## KEEPING TECHNOLOGY IN PERSPECTIVE

Remember that technology is an aid to communication, not a replacement for it. Technology can't think for you, make up for a lack of essential skills, or ensure that communication really happens. For example, you might have a presence on every new social media platform that comes along, but if the messages you are sending are confusing or self-serving, none of that technology will help.

Don't let technology overwhelm the communication process.

## USING TOOLS PRODUCTIVELY

You don't have to become an expert to use most communication technologies effectively, but to work efficiently you do need to be familiar with basic features and functions. Conversely, don't worry about learning advanced features unless you really need to use them. Many software packages contain dozens of obscure features that typical business communicators rarely need.

**MOBILE APPS**

Pocket collects content you'd like to read or view later and syncs it across your mobile devices.

## GUARDING AGAINST INFORMATION OVERLOAD

The overuse or misuse of communication technology can lead to **information overload**, in which people receive more information than they can effectively process. Information overload makes it difficult to discriminate between useful and useless information, inhibits the ability to think deeply about complex situations, lowers productivity, and amplifies employee stress both on the job and at home—even to the point of causing health and relationship problems.[71]

As a sender, make sure every message you send is meaningful and important to your receivers. As a recipient, take steps to control the number and types of messages you receive. Use the filtering features of your communication systems to isolate high-priority messages that deserve your attention. Also, be wary of following too many blogs, Twitter accounts, and social networking feeds, and other sources of recurring messages. Focus on the information you truly need to do your job.

Everyone has an important role to play in reducing information overload.

## RECONNECTING WITH PEOPLE FREQUENTLY

Even the best technologies can hinder communication if they are overused. For instance, a common complaint among employees is that managers rely too heavily on email and don't communicate face-to-face often enough.[72] Speaking with people over the phone or in person can take more time and effort, and can sometimes force you to confront unpleasant situations directly, but it is often essential for solving tough problems and maintaining productive relationships.[73]

No matter how much technology is involved, communication will always be about people connecting with people.

Moreover, even the best communication technologies can't show people who you really are. Remember to step out from behind the technology frequently to learn more about the people you work with—and to let them learn more about you.

For the latest information on business communication technologies, visit **http://real-timeupdates.com/bce7** and click on Chapter 1 "Professional Communication in Today's Digital, Social, Mobile World."

**REAL-TIME UPDATES**

LEARN MORE BY READING THIS ARTICLE

**Twelve reasons why talking can be better than texting**

Professor Ellen Bremen offers a dozen reasons why she thinks talking promotes more effective communication than texting. Go to **http://real-timeupdates.com/bce7**. Under "Students," click on "Learn More."

## COLLABORATING

Thanks to advances in mobile and distributed communication, the “office” is no longer what it used to be. Technology lets today’s professionals work on the move while staying in close contact with colleagues, customers, and suppliers. These technologies are also redefining the very nature of some companies, as they replace traditional hierarchies with highly adaptable, virtual networks.

# Powerful Tools for Communicating Effectively

**The tools of business communication evolve with every advance in digital technology. The 20 technologies highlighted on the next four pages help businesses redefine the office, collaborate and share information, connect with stakeholders, and build communities of people with shared interests and needs. For more examples of business uses of social media tools in particular, see pages 182–183 in Chapter 6.**

## Shared Online Workspaces


Microsoft Office 2013, copyright © 2013 Microsoft Corporation.

Online workspaces help teams work productively, even if they are on the move or spread out across the country. In addition to providing controlled access to shared files and other digital resources, some systems include such features as project management tools and real-time document sharing (letting two or more team members view and edit a document on screen at the same time).

## Web-Based Meetings

Andresr/Shutterstock

Web-based meetings allow team members from all over the world to interact in real time. Meetings can also be recorded for later playback and review. Various systems support instant messaging, video, collaborative editing tools, and more.

## Videoconferencing and Telepresence

.shock/Fotolia

Videoconferencing provides many of the benefits of in-person meetings at a fraction of the cost. Advanced systems feature *telepresence*, in which the video images of meeting participants are life-sized and extremely realistic.

Antun Hirsman/Shutterstock

## Voice Technologies

Fancy/Alamy

*Speech recognition* (converting human speech to computer commands) and *speech synthesis* (converting computer commands to human speech) can enhance communication in many ways, including simplifying mobile computing, assisting workers who are unwilling or unable to use keyboards, and allowing “one-sided” conversations with information systems. *Speech analytics software* can evaluate conversations to improve customer service and other interactions. *Mobile VoIP* lets people make voice calls on WiFi networks to save connection and roaming charges.

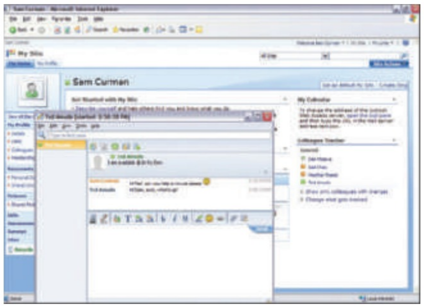
## Mobile Business Apps

As the range of business software applications on smartphones and tablet computers continues to expand, almost anything that can be accomplished on a regular computer can be done on a mobile device (although not always as efficiently or with the same feature sets).

## COLLABORATING AND SHARING INFORMATION

The need to work with and share information quickly and easily is a constant in business. A wide variety of tools have been developed to facilitate collaboration and sharing, from general purpose systems such as instant messaging to more specialized capabilities such as data visualization.

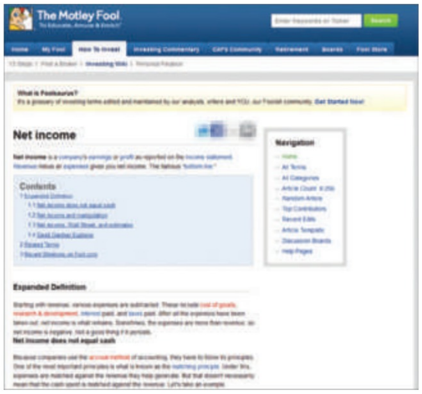
### Instant Messaging



Microsoft Outlook, copyright © 2013 Microsoft Corporation.

Instant messaging (IM) is one of the most widely used digital communication tools in the business world, replacing many conversations and exchanges that once took place via email or phone calls. *Enterprise IM systems* are similar to consumer IM systems in many respects but have additional security and collaboration features.

### Wikis



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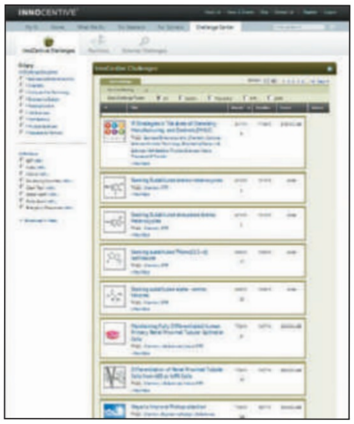
Wikis promote collaboration by simplifying the process of creating and editing online content. Anyone with access (some wikis are private; some are public) can add and modify pages as new information becomes available.

### Crowdsourcing and Collaboration Platforms



Innocentive, Inc.

*Crowdsourcing,* inviting input from groups of people inside or outside the organization, can give companies access to a much wider range of ideas, solutions to problems, and insights into market trends.

### Data Visualization

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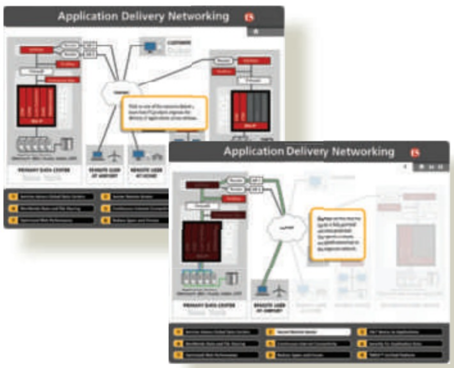
Data visualization is a powerful tool for presenting and exploring sets of data that are very large, complex, or dynamic. As more companies rely on "big data" to identify and capitalize on market opportunities, the ability to extract insights from these large data sets can be an important competitive advantage.

### Interactive Websites



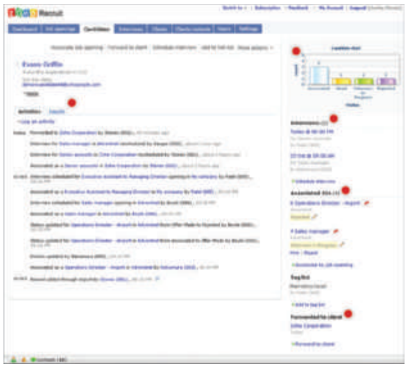

Courtesy of F5 Networks, Inc.

Interactivity can make online communication much more engaging and effective, such as by personalizing the presentation of information or allowing website visitors to isolate and focus on specific topics.

## CONNECTING WITH STAKEHOLDERS

Electronic media and social media in particular have redefined the relationships businesses have with internal and external stakeholders. Any groups affected by a company's decisions now have tools to give voice to their opinions and needs, and companies have many more conversational threads that need to be monitored and managed.

### Applicant Tracking Systems



Courtesy of ZOHO Corporation

*Applicant tracking systems* now play a huge role in employment-related communications. At virtually all large companies and many medium and small companies, your résumé and application information will be entered into one of these systems. Recruiters use various tools to identify promising candidates and manage the interview and selection process. After hiring, some firms use *talent management systems* to track employee development through workers' entire careers at the company.

### Online Video


YouTube, LLC

The combination of low-cost digital video cameras and video-sharing websites such as YouTube has spurred a revolution in business video. Product demonstrations, company overviews, promotional presentations, and training seminars are among the most popular applications of business video. *Branded channels* allow companies to present their videos as an integrated collection in a customized user interface.

### Blogging


Courtesy of Xerox Corporation

Blogs let companies connect with customers and other audiences in a fast and informal way. Commenting features let readers participate in the conversation, too.

### Content Curation


Bovee and Thill, LLC website

*Media curation*, selecting videos and other items of interest to followers of a website or blog, has become one of the most popular ways to connect with stakeholders. Pinterest and Scoop.it are among the leading technologies in this area.

### Podcasting

LearningStockImages/Alamy

With the portability and convenience of downloadable audio and video recordings, podcasts have become a popular means of delivering everything from college lectures to marketing messages. Podcasts are also used for internal communication, replacing conference calls, newsletters, and other media.

## BUILDING COMMUNITIES

One of the most significant benefits of new communication technologies is the ease with which companies can foster a sense of community among customers, enthusiasts, and other groups. In some instances, the company establishes and manages the online community, while in others the community is driven by *product champions* or other enthusiasts.

### User-Generated Content Sites



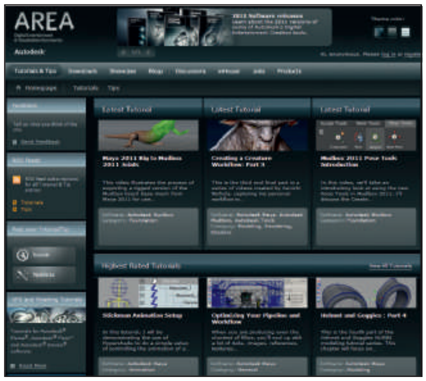
User-generated content sites let businesses host photos, videos, software programs, technical solutions, and other valuable content for their customer communities.

### Gaming Technologies




Encouraging people to play games, even games as simple as "checking in" at various retail locations, can build interest in a company and its brands.

### Community Q&A Sites






Many companies now rely heavily on communities of customers to help each other with product questions and other routine matters.

### Microblogging




Microblogging services (of which Twitter is by far the best known) are a great way to share ideas, solicit feedback, monitor market trends, and announce special deals and events.

### Social Networking




Businesses use a variety of social networks as specialized channels to engage customers, find new employees, attract investors, and share ideas and challenges with peers.

# Chapter Review and Activities

## Learning Objectives: Check Your Progress

**Objective 1: Define *communication*, and explain the importance of effective business communication.**

Communication is the process of transferring information and meaning between senders and receivers, using one or more written, oral, visual, or digital media. The ability to communicate well will play a key role in your success as a business professional. Communication is essential to every function in business, and poor communication skills will limit your career prospects, no matter how ambitious or skilled you are in other areas. Communication skills also give you an important competitive advantage in the job market.

As an effective communicator, you will be more valuable to your company as well, because good communication skills help companies in many ways: building closer ties with important communities in the marketplace; influencing conversations, perceptions, and trends; increasing productivity and solving problems in less time; attaining better financial results and higher return for investors; enabling earlier warning of potential problems; making better decisions; creating more compelling promotional messages; and improving employee engagement.

To make your communication efforts as effective as possible, focus on making them practical, factual, concise, clear, and persuasive.

**Objective 2: Explain what it means to communicate as a professional in a business context.**

Communicating as a professional starts with being a professional, which embodies striving to excel, being dependable and accountable, being a team player, demonstrating a sense of etiquette, making ethical decisions, and maintaining a positive outlook.

As a professional, you will be expected to bring a wide range of communication skills, including organizing ideas and information; expressing yourself coherently and persuasively in a variety of media; building persuasive arguments; evaluating data and information critically; actively listening to others; communicating effectively with diverse audiences; using communication technologies; following accepted standards of grammar, spelling, and other aspects of high-quality writing and speaking; adapting your messages and communication styles as needed; demonstrating strong business etiquette; communicating ethically; respecting confidentiality; following applicable laws and regulations; managing your time wisely; and using resources efficiently.

Communicating in an organizational context involves adapting your skills to a professional environment and using the company's communication system (in the broadest sense of the word) to gather and distribute information. An audience-centered approach to communication means focusing on understanding and meeting the needs of all your audience members, rather than focusing on your own needs.

**Objective 3: Describe the communication process model, and explain how social media are changing the nature of business communication.**

Communication can be modeled as an eight-step process: (1) the sender has an idea, (2) the sender encodes that idea in a message, (3) the sender produces the message in a transmittable medium, (4) the sender transmits the message through a channel, (5) the audience receives the message, (6) the audience decodes the message, (7) the audience responds to the message, and (8) the audience provides feedback to the sender.

Social media have given customers and other stakeholders a voice they did not have in the past by giving them the tools to gather information from multiple sources, to respond to companies and other organizations, and to initiate conversations in the marketplace. Social media are also changing the nature of messages. A message initiated by one party is often revised and reshaped by the web of participants as they share it and comment on it.

**Objective 4: Outline the challenges and opportunities of mobile communication in business.**

The challenges and opportunities of mobile communication include the mixed blessing of constant connectivity, the challenge of creating and consuming content on small screens and keyboards, the multitasking behavior of mobile users in chaotic environments, the pressure being put on traditional expectations of grammar and spelling, the opportunity for mobile devices to be sensory and cognitive extensions, security and privacy concerns, improvements to productivity and collaboration, the ability to use business-focused apps for a variety of tasks, accelerating decision making and problem solving, and the opportunity to creative more-engaging experiences using the unique features of mobile devices.

**Objective 5: Define *ethics*, explain the difference between an ethical dilemma and an ethical lapse, and list six guidelines for making ethical communication choices.**

Ethics are the accepted principles of conduct that govern behavior within a society; they define the boundary between right and wrong. Ethical communication includes all relevant information, is true in every sense, does not violate the rights of others, and is not deceptive in any way.

An ethical dilemma involves choosing among alternatives that aren't clear-cut; an ethical lapse is a clearly unethical (and frequently illegal) choice. To ensure the decisions you make are ethical, follow these six guidelines: make sure you have defined the situation fairly and accurately, make sure your intentions are honest and fair, understand the impact your messages will have on others, ensure that your messages will achieve the greatest possible good while doing the least possible harm, make sure your underlying assumptions won't change over time, and make sure you are comfortable with your choices.

**Objective 6: Explain how cultural diversity affects business communication, and describe the steps you can take to communicate more effectively across cultural boundaries.**

Cultural diversity affects business communication because culture influences the way people create, send, and interpret messages. Moreover, the influences of culture can be profound, and they are often unrecognized by the people involved. Major aspects of culture that affect communication include cultural context, legal and ethical differences, social customs, nonverbal communication, age differences, gender, religion, and ability.

To communicate effectively across cultures, avoid ethnocentrism and stereotyping, don't make assumptions about others' beliefs and values, avoid judgment, learn to communicate respect, tolerate ambiguity, don't be distracted by superficial elements, recognize your own cultural biases, be flexible, and learn about cultures in which you do business. Also, follow the advice for writing and speaking in multilanguage environments (pages 65).

**Objective 7: List four general guidelines for using communication technology effectively.**

To help avoid the potential drawbacks of using communication technology, (1) keep technology in perspective so that it doesn't overwhelm the communication process, (2) learn your tools so you can use them productively, (3) guard against information overload by sending only those messages of value to your audiences and by protecting yourself from too many low-value incoming messages, and (4) disengage from the computer frequently to communicate in person.

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Go to **mybcommlab.com** to complete the problems marked with this icon ✪.

## Test Your Knowledge

To review chapter content related to each question, refer to the indicated Learning Objective.

✪ **1-1.** What are the six traits of professionalism? [LO-2]

**1-2.** List some of the ways that mobile technology is impacting business communications. [LO-4]

✪ **1-3.** Explain the difference between ethical dilemmas and ethical lapses. [LO-5]

✪ **1-4.** How does cultural context affect communication? [LO-6]

## Apply Your Knowledge

To review chapter content related to each question, refer to the indicated Learning Objective.

✪ **1-5.** Why do you think communication is vital to the success of every business organization? Explain briefly. [LO-1]

✪ **1-6.** Explain, with examples, how etiquette is relevant even today in audience-centered communication. [LO-2]

✪ **1-7.** What are the benefits and disadvantages of adopting the social communications model? [LO-3]

**1-8.** What changes would you make to your email messages if you know your recipients are typically walking or riding on mass transit when they read your messages? [LO-4]

**1-9.** Imagine that you've been invited to a parent–teacher meeting at your child's school next week. However, your boss has also assigned you to a crucial business call that very same day. You've tried convincing your boss about your earlier commitment, but to no avail. Your colleagues tell you that you should slip away during the free time at lunch to attend the meeting without the boss noticing. Explain whether this would be an ethical dilemma or an ethical lapse. Remember that if your boss were to notice your absence from work, it could earn you a reprimand. [LO-5]

**1-10.** Recall one instance in which you were confused by a behavior, an attitude, or a belief you observed in another culture. (Don't limit yourself to ethnic or national definitions of culture; consider religion, age, and other factors as well.) What about this cultural difference confused you? Why do you think the culture exhibits this behavior, attitude, or belief? How might it impede communication? [LO-6]

## Practice Your Skills

### Activities

Each activity is labeled according to the primary skill or skills you will need to use. To review relevant chapter content, you can refer to the indicated Learning Objective. In some instances, supporting information will be found in another chapter, as indicated.

**1-11. Writing: Compositional Modes: Summaries [LO-1], Chapter 3** Write a paragraph introducing yourself to your instructor and your class. Address such areas as your background, interests, achievements, and goals. Submit your paragraph using email, blog, or social network, as indicated by your instructor.

**1-12. Media Skills: Microblogging [LO-1], Chapter 6** Write four messages of no more than 140 characters each (short enough to work as Twitter tweets, in other words) to persuade other college students to take the business communication course. Think of the first message as the "headline" of an advertisement that makes a bold promise regarding the value this course offers every aspiring business professional. The next three messages should be support points that provide evidence to back up the promise made in the first message.[74]

**1-13. Fundamentals: Analyzing Communication Effectiveness [LO-1]** Identify a video clip (on YouTube or another online source) that you believe represents an example of effective communication. It can be in any context, business or otherwise, but make sure it is something appropriate to discuss in class. Post a link to the video on your class blog, along with a brief written summary of why you think this example shows effective communication in action.

**1-14. Planning: Assessing Audience Needs [LO-2], Chapter 3** Assume that you are running for president at a local sports club, for which there is another contender. Although you have administrative experience in managing sports clubs, the other contender is a professional sportsperson. Most of the club members consist of retired sports personnel, commentators, and sports journalists, most of whom feel that the club lacks the latest equipment, proper restrooms, and secure locker facilities. Write a statement to be emailed to each member, clearly stating what you would do for the club once elected. Remember that you need to understand the profile of your audience before you commit to writing.

**1-15. Communication Etiquette: Communicating with Sensitivity and Tact [LO-2]** As a crisis manager for a company that manufactures insulin, you have just received an email from a high-profile patient using your product who suffered a hypoglycemic attack. The patient blames your insulin and is threatening to sue. You know that your product and the batch are quality tested, and that it could have been due to a delay by the patient in administering the insulin or a dietary issue. Write a tactful email to the patient, showing your concern and offering probable reasons as to why this could have happened, yet reiterating your company's commitment to quality standards.

**1-16. Fundamentals: Evaluating Communication Effectiveness [LO-3]** Use the eight phases of the communication process to analyze a miscommunication you've recently had with a co-worker, supervisor, classmate, instructor, friend, or family member. What idea were you trying to share? How did you encode and transmit it? Did the receiver get the message? Did the receiver decode the message as you had intended? How do you know? Based on your analysis, what do you think prevented your successful communication in this instance? Summarize your conclusions in an email message to your instructor.

**1-17. Writing: Compositional Modes: Persuasion [LO-3], Chapter 9** Social media use varies widely from company to company. Some firms enthusiastically embrace these new tools and new approaches. Others have taken a more cautious approach, either delaying the adoption of social media or restricting their use. You work for an "old school" manufacturing firm that prohibits employees from using social media during work hours. Company management believes that social media offer little or no business value and distract employees from more important duties. In a brief email message to your boss, identify the ways that social media are changing the communication process and relationships between companies and their employees, customers, and communities. Provide at least one example of a real manufacturing company that uses social media.

**1-18. Fundamentals: Analyzing Communication Effectiveness [LO-4]** Using a mobile device, visit the websites of five companies that make products or provide services you buy or might buy in the future. Which of the websites is the most user-friendly? How does it differ from the other sites? Do any of the companies offer a mobile shopping app for your device?

**1-19. Communication Ethics: Distinguishing Ethical Dilemmas and Ethical Lapses [LO-5]** In a report of no more than one page, explain why you think each of the following is or is not ethical:

**a.** Deemphasizing negative test results in a report on your product idea

**b.** Taking an office computer home to finish a work-related assignment

**c.** Telling an associate and close friend that she should pay more attention to her work responsibilities or management will fire her

**d.** Recommending the purchase of excess equipment to use up your allocated funds before the end of the fiscal year so that your budget won't be cut next year

**1-20. Communication Ethics: Protecting Company Resources [LO-5]** Blogging is a popular way for employees to communicate with customers and other parties outside the company. In some cases, employee blogs have been quite beneficial for both companies and their customers, providing helpful information and "putting a human face" on otherwise formal and imposing corporations. However, in some cases, employees have been fired for posting information their employers said was inappropriate. One particular area of concern is criticism of the company or individual managers. Should employees be allowed to criticize their employers in a public forum such as a blog? In a brief email message, argue for or against company policies that prohibit any critical information in employee blogs.

**1-21. Communication Ethics: Providing Ethical Leadership [LO-5]** You are designated as project head of a two-member team assigned to complete a survey. Your team has to survey 100 people with a 20-question format and has just three days to complete it. Write an email to your team members explaining the importance of maintaining the highest standards of work ethics and encouraging them to complete the task.

**1-22. Communication Ethics: Resolving Ethical Dilemmas [LO-5]** Knowing that you have numerous friends throughout the company, your boss relies on you for feedback concerning employee morale and other issues affecting the staff. She recently approached you and asked you to start reporting any behavior that might violate company polices, from taking office supplies home to making personal long-distance calls. List the issues you'd like to discuss with her before you respond to her request.

**1-23. Intercultural Communication: Writing for Multiple-Language Audiences [LO-6]** As the university representative for L'École Genérale France, it is your job to welcome new students to the campus. It is a challenge that many students this year are from South-East Asia and not from native-English-speaking backgrounds. Considering that each student is from a different cultural background, explain how you would go about preparing a small handbook welcoming these students respectfully. Do you think a verbal or a nonverbal style would work better? How would you ensure that these students understand and process the information rather than just receive it? Write an email to the dean of your institute listing your responses to each of the above.

**1-24. Intercultural Communication: Recognizing Cultural Variations; Collaboration: Solving Problems [LO-6], Chapter 2** Working with two other students, prepare a list of 10 examples of slang (in your own language) that would probably be misinterpreted or misunderstood during a business conversation with someone from another culture. Next to each example, suggest other words you might use to convey the same message. Do the alternatives mean exactly the same as the original slang or idiom? Summarize your findings in an email message or post for a class blog.

**1-25.** **Intercultural Communication: Recognizing Cultural Variations [LO-6]** Choose a country with which you are not familiar. Research the culture and write a one-page report outlining what a U.S. businessperson would need to know about concepts of personal space and rules of social behavior in order to conduct business successfully in that country.

**1-26.** **Intercultural Communication: Recognizing Cultural Variations [LO-6]** Differences in gender, age, and physical and cognitive abilities contribute to the diversity of today's workforce. Working with a classmate, role-play a conversation in which

- **a.** A woman is being interviewed for a job by a male human resources manager
- **b.** An older person is being interviewed for a job by a younger human resources manager
- **c.** A person using a wheelchair is being interviewed for a job by a person who can walk

How did differences between the applicant and the interviewer shape the communication? What can you do to improve communication in such situations? Summarize your findings in an email message or post for a class blog.

**1-27.** **Technology: Using Communication Tools [LO-7]** Find a free online communication service that you have no experience using as a content creator or contributor. Services to consider include blogging (such as Blogger), microblogging (such as Twitter), community Q&A sites (such as Yahoo! Answers), and user-generated content sites (such as Flickr). Perform a basic task such as opening an account or setting up a blog. Was the task easy to perform? Were the instructions clear? Could you find help online if you needed it? Is there anything about the experience that could be improved? Summarize your conclusions in a brief email message to your instructor.

# Expand Your Skills

### Critique the Professionals

Locate an example of professional communication from a reputable online source. It can reflect any aspect of business communication, from an advertisement or a press release to a company blog or website. Evaluate this communication effort in light of any aspect of this chapter that is relevant to the sample and interesting to you. For example, is the piece effective? Audience-centered? Ethical? Using whatever medium your instructor requests, write a brief analysis of the piece (no more than one page), citing specific elements from the piece and support from the chapter.

### Sharpen Your Career Skills Online

Bovée and Thill's Business Communication Web Search, at **http://websearch.businesscommunicationnetwork.com**, is a unique research tool designed specifically for business communication research. Use the Web Search function to find a website, video, PDF document, podcast, or presentation that explains at least one essential business communication skill. Write a brief email message to your instructor or a post for your class blog describing the item you found and summarizing the career skills information you learned from it.

# Improve Your Grammar, Mechanics, and Usage

You can download the text of this assignment from **http://real-timeupdates.com/bce7**; click on Student Assignments and then click on Chapter 1, Improve Your Grammar, Mechanics, and Usage.

### Level 1: Self-Assessment—Nouns

Use the following self-assessment exercises to improve your knowledge of and power over English grammar, mechanics, and usage. Review all of Section 1.1 in the Handbook of Grammar, Mechanics, and Usage that appears at the end of this book. Answers to these exercises appear on page 499.

For the following items, indicate which words are common nouns and which are proper nouns.

**1-28.** Give the balance sheet to Melissa.

**1-29.** After three years of declining sales, the board fired the CEO and hired a replacement from Google.

**1-30.** Tarnower Corporation donates a portion of its profits to charity every year.

**1-31.** Which aluminum bolts are packaged?

**1-32.** Please send the Joneses a dozen of each of the following: stopwatches, canteens, headbands, and wristbands.

For the following items, underline the subjects and circle the objects.

**1-33.** The technician has already repaired the machine for the client.

**1-34.** An attorney will talk to the group about incorporation.

**1-35.** After her vacation, the buyer prepared a third-quarter budget.

**1-36.** More than 90 percent of the research staff has contributed to the new wiki.

**1-37.** Accuracy overrides speed in importance.

For the following items, indicate any inappropriate noun plurals and possessives and provide the correct form.

**1-38.** Make sure that all copys include the new addresses.

**1-39.** Ask Jennings to collect all employee's donations for the Red Cross drive.

**1-40.** Charlie now has two son-in-laws to help him with his two online business's.

**1-41.** Avoid using too many parenthesises when writing your reports.

**1-42.** Follow President Nesses rules about what constitutes a weeks work.

### Level 2: Workplace Applications

The following items may contain errors in grammar, capitalization, punctuation, abbreviation, number style, word division, and vocabulary. Rewrite each sentence, correcting all errors. If a sentence has no errors, write "Correct" for that number.

**1-43.** If a broken down unproductive guy like Carl can get a raise; why can't a take charge guy like me get one?

**1-44.** Visit our website and sign up for "On Your Toes", our free newsletter that keeps you informed of promotions, discounts and about Internet-only specials.

**1-45.** As of March, 2015, the Board of Directors have 9 members including: three women, one African-American, and one American of Hispanic descent.

**1-46.** As one of the nearly 3,000,000 New York Life policyholders eligible to vote, we urge you to approve the new investment advisory agreement.

**1-47.** Gerrald Higgins, vice president for marketing, told us reporters that Capital One provides financial services to one-fourth of homes in the United States.

**1-48.** Our Customer Relations associates work with people everyday to answer questions, provide assistance, and helping solve problems.

**1-49.** If anyone breaches the lease, its likely that the landlord will file legal action against them to collect on the remainder of they're lease.

**1-50.** A IRA is one of the most common plans for the self-employed because of it's ease of setting up and administering.

**1-51.** My advise to you is, to put you're mission statement on your web cite.

**1-52.** According to Karen Smiths' report small-business owners don't recognize the full effect that layoffs and terminations are liable to have on the motivation of surviving employees'.

**1-53.** To exacerbate the processing of your US tax return, use the mailing label and bar coded envelope that comes with your tax package.

**1-54.** The NASE have implemented a exciting array of programs that make it more easy for legislative opinions and concerns to be voiced by you.

**1-55.** Keep in mind the old saying "When we laugh the world laugh with us, when you cry you cry alone."

**1-56.** Albert Edmunds and me are Owners of the real estate firm of Edmunds & Cale, which have recently opened a new office in San Diego co.

**1-57.** The memo inferred that the economic downturn will have a greater affect on the company's bottom line then we previously assumed, this was the worse news we could of gotten.

### Level 3: Document Critique

The following document may contain errors in grammar, capitalization, punctuation, abbreviation, number style, word division, and vocabulary. As your instructor indicates, photocopy this page and correct all errors using standard proofreading marks (see Appendix C) or download the document and make the corrections in your word-processing software.

> Memo
>
> TO: All Employees
> FROM: Roberta Smith, Personnel Director
> DATE: December 28, 2015
> SUBJECT: time Cards
>
> After reviewing our Current Method of keeping track of employee hours; we have concluded that time cards leave a lot to be desired. So starting Monday, we have a new system, a time clock. You just have to punch in and punch out; whenever you will come and go from your work area's.
>
> The new system may take a little while to get used to, but should be helpful to those of us who are making a new years resolution to be more punctual.
>
> Happy New Year to all!

**MyBCommLab**

Go to **mybcommlab.com** for the following Assisted-graded writing questions:

**1-58.** What benefits does effective communication give you and your organization? [LO-1]

**1-59.** Why is it important to also connect in person when using technology to communicate? [LO-7]

## Endnotes

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# 2 Collaboration, Interpersonal Communication, and Business Etiquette

## LEARNING OBJECTIVES

After studying this chapter, you will be able to

1. List the advantages and disadvantages of working in teams, and describe the characteristics of effective teams
2. Offer guidelines for collaborative communication, identify major collaboration technologies, and explain how to give constructive feedback
3. List the key steps needed to ensure productive team meetings, and identify the most common meeting technologies
4. Describe the listening process, and explain how good listeners overcome barriers at each stage of the process
5. Explain the importance of nonverbal communication, and identify six major categories of nonverbal expression
6. Explain the importance of business etiquette, and identify four key areas in which good etiquette is essential



## Communication Matters . . .

"New communication platforms, like Facebook and LinkedIn, have blurred the lines of appropriateness, and we're all left wondering how to navigate uncharted social territory."[1]
—Eliza Browning, Vice President, Crane Digital

Eliza Browning's observation about Facebook and LinkedIn reflects the importance of interpersonal communication in today's business environment. Whether the interaction takes place online or in person, creating and fostering positive relationships with colleagues, customers, and others can make or break your career. This chapter focuses on the communication skills you need in order to work well in team settings and on important interpersonal communication topics that will help you on the job: productive meetings, active listening, nonverbal communication, and business etiquette.

Eliza Browning, "Business Etiquette: 5 Rules That Matter Now," Inc.

Crane Digital's Eliza Browning emphasizes that business etiquette isn't about fussy rules and outdated behavior; it's about showing respect for other people.

# Communicating Effectively in Teams

1 LEARNING OBJECTIVE
List the advantages and disadvantages of working in teams, and describe the characteristics of effective teams.

**Collaboration**—working together to meet complex challenges—has become a core job responsibility for roughly half the U.S. workforce.[2] No matter what career path you pursue, it's a virtual guarantee that you will be expected to collaborate in at least some of your work activities. Your communication skills will pay off handsomely in these interactions, because the productivity and quality of collaborative efforts depend heavily on communication skills.

Team members have a shared mission and are collectively responsible for the team's performance.

A **team** is a unit of two or more people who share a mission and the responsibility for working to achieve their goal.[3] You will participate in teams throughout your career, so developing the skills to communicate successfully in team settings will give you an important advantage. Businesses use a wide variety of teams, from short-term problem-solving teams to permanent committees that sometimes become formal parts of the organization structure. Some teams meet and work together in person, whereas others are virtual teams, whose members work in different locations and interact through one or more electronic channels. Communication skills are particularly important with virtual teams because the physical separation can complicate everything from helping new members get oriented to capturing the knowledge a team accumulates over time.[4]

## ADVANTAGES AND DISADVANTAGES OF TEAMS

Learning how to communicate and work well in team settings will help your company and your career.

When teams are successful, they can improve productivity, creativity, employee involvement, and even job security.[5] Teams are often at the core of **participative management**, the effort to involve employees in the company's decision making. The advantages of successful teamwork include[6]

- **Increased information and knowledge.** By pooling the experience of several individuals, a team has access to more information in the decision-making process.
- **Increased diversity of views.** Bringing a variety of perspectives can improve decision making—as long as these diverse viewpoints are guided by a shared goal.[7]
- **Increased acceptance of a solution.** Those who participate in making a decision are more likely to support it and encourage others to accept it.
- **Higher performance levels.** Effective teams can be better than top-performing individuals at solving complex problems.[8]

Although teamwork has many advantages, teams need to be aware of and work to counter the following potential disadvantages:

- **Groupthink.** Like other social structures, business teams can generate tremendous pressures to conform. **Groupthink** occurs when peer pressures cause individual team members to withhold contrary or unpopular opinions and to go along with decisions they don't really believe in. The result can be decisions that are worse than the choices the team members might have made individually.
- **Hidden agendas.** Some team members may have a **hidden agenda**—private, counterproductive motives, such as a desire to take control of the group, to undermine someone else on the team, or to pursue an incompatible goal.
- **Cost.** Aligning schedules, arranging meetings, and coordinating individual parts of a project can eat up a lot of time and money.

## CHARACTERISTICS OF EFFECTIVE TEAMS

Effective teams
- Understand their purpose
- Communicate openly and honestly
- Build consensus
- Think creatively
- Stay focused
- Resolve conflict

Effective teams share a number of traits, including a clear objective, a shared sense of purpose, full engagement from all team members, procedures for reaching decisions by consensus, and the right mix of creative and technical talents for the tasks at hand. While all these traits contribute to team success, however, the single most important factor is how well the team members communicate.[9]

In contrast, teams that lack one or more of these attributes can get bogged down in conflict or waste time and resources pursuing unclear goals. Two of the most common reasons cited for unsuccessful teamwork are a lack of trust and poor communication. A lack of trust can result from team members being suspicious of one another's motives or ability to contribute.[10] Poor communication can also result from basic differences in conversational styles. For example, some people expect conversation to follow an orderly pattern in which team members wait their turn to speak, whereas others might view conversation as more spontaneous and are comfortable with an overlapping, interactive style.[11]

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Many teams experience conflict in the course of their work, but conflict isn't necessarily bad. Conflict can be constructive if it forces important issues into the open, increases the involvement of team members, and generates creative ideas for solving a problem. Even teams that have some friction can excel if they have effective leadership and members who are committed to positive outcomes. As teamwork experts Andy Boynton and Bill Fischer put it, "Virtuoso teams are not about getting polite results."[12]

Conflict in team settings isn't necessarily bad, as long as team members can stay focused on the goal.

# Collaborating on Communication Efforts

When a team collaborates on reports, websites, presentations, and other communication projects, the collective energy and expertise of the various members can produce results that transcend what each individual could do alone.[13] However, collaborating on team messages requires special effort and planning.

2 LEARNING OBJECTIVE
Offer guidelines for collaborative communication, identify major collaboration technologies, and explain how to give constructive feedback.

## GUIDELINES FOR COLLABORATIVE WRITING

In any collaborative effort, team members coming from different backgrounds may have different work habits or priorities: A technical expert may focus on accuracy and scientific standards; an editor may be more concerned about organization and coherence; and a manager may focus on schedules, cost, and corporate goals. In addition, team members differ in writing styles, work habits, and personality traits.

To collaborate effectively, everyone involved must be flexible and open to other opinions, focusing on team objectives rather than on individual priorities.[14] Most ideas can be expressed in many ways, so avoid the "my way is best" attitude when working with others. The following guidelines will help you collaborate more successfully:[15]

**MOBILE APPS**

Freedcamp is a free collaboration and project management system.

- **Select collaborators carefully.** Whenever possible, choose a combination of people who together have the experience, information, and talent needed for each project.
- **Agree on project goals before you start.** Starting without a clear idea of what the team hopes to accomplish inevitably leads to frustration and wasted time.
- **Give your team time to bond before diving in.** If people haven't had the opportunity to work together before, try to arrange time so that they can get to know each other before being asked to collaborate.
- **Clarify individual responsibilities.** Because members will be depending on each other, make sure individual responsibilities are clear.
- **Establish clear processes.** Make sure everyone knows how the work will be managed from start to finish.
- **Avoid writing as a group.** The actual composition is the only part of developing team messages that does not usually benefit from group participation. Brainstorming the wording of short pieces of text, particularly headlines, slogans, and other high-visibility elements, can be an effective way to stimulate creative word choices. However, for longer projects, it is usually more efficient to plan, research, and outline together but assign the task of writing to one person or divide larger projects among multiple writers. If you divide the writing, try to have one person do a final revision pass to ensure a consistent style.
- **Make sure tools and techniques are ready and compatible across the team.** Even minor details such as different versions of software can delay projects.
- **Check to see how things are going along the way.** Don't assume that everything is working just because you don't hear anything negative.

Successful collaborative writing requires a number of steps, from selecting the right partners and agreeing on project goals to establishing clear processes and avoiding writing as a group.

## TECHNOLOGIES FOR COLLABORATIVE WRITING

Collaboration tools include group review and commenting features, content management systems, wikis, and dedicated collaboration platforms.

A variety of tools are available to help writers collaborate on everything from short documents to entire websites. The simplest tools are software features such as *commenting* (which lets colleagues write comments in a document without modifying the document text) and *change tracking* (which lets one or more writers propose changes to the text while keeping everyone's edits separate and reversible). The widely used Adobe Acrobat electronic document system (PDF files) also has group review and commenting features, including the option for live collaboration.

### Collaboration Systems

Collaborating on website content often involves the use of a **content management system**, which organizes and controls website content and can include features that help team members work together on webpages and other documents. These systems range from simple blogging systems on up to *enterprise* systems that manage web content across an entire corporation. Many systems include *work flow* features that control how pages or documents can be created, edited, and published.

In contrast to the formal controls of a content management system, a **wiki**, from the Hawaiian word for *quick,* is a website that allows anyone with access to add new material and edit existing material. Public wikis (Wikipedia is the best known of these) allow any registered user to edit pages; private wikis are accessible only with permission. A key benefit of wikis is the freedom to post new or revised material without prior approval. Chapter 11 offers guidelines for effective wiki collaboration.

Teams and other work groups can also take advantage of a set of broader technologies often referred to as *groupware* or *collaboration platforms*. These technologies let people communicate, share files, review previous message threads, work on documents simultaneously, and connect using social networking tools. These systems help companies capture and share knowledge from multiple experts, bringing greater insights to bear on tough challenges.[16] Collaboration systems often take advantage of *cloud computing*, a somewhat vague term that refers to "on-demand" capabilities delivered over the Internet, rather than through conventional on-site software.[17]

**Shared workspaces** are online "virtual offices" that give everyone on a team access to the same set of resources and information (see Figure 2.1). You may see some of these workspaces referred to as *intranets* (restricted-access websites that are open to employees only) or *extranets* (restricted sites that are available to employees and to outside parties by invitation only). Many intranets have now evolved into social networking systems that

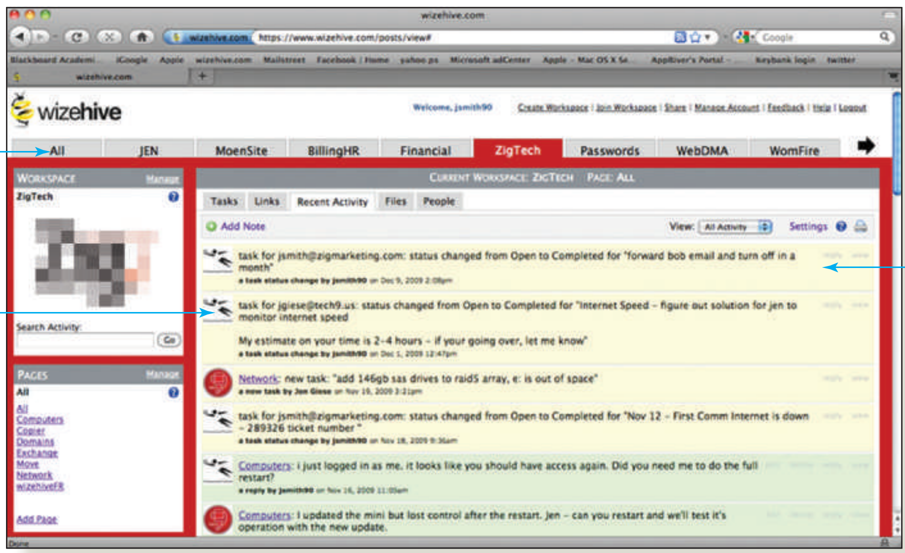


**Figure 2.1 Shared Workspaces**
Shared workspaces give employees instant access to all the files they need.
*Source:* Copyright © 2011 by Wize Hive. Reprinted with permission.

include a variety of communication and collaboration tools, from microblogging to video clip libraries. For example, the performance troupe Blue Man Group uses a *social intranet* to help its 500 employees plan, stage, and promote shows all over the world.[18]

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Going mobile helps teams work faster and more effectively. Go to **http://real-timeupdates.com/bce7**. Under "Students," click on "Learn More."

### Collaboration via Mobile Devices

Mobile devices add another layer of options for collaborative writing and other communication projects, particularly when used with cloud computing. Today's mobile systems can do virtually everything that fixed-web collaboration systems can do, from writing on virtual whiteboards to sharing photos, videos, and other multimedia files.[19] Mobility lets workers participate in online brainstorming sessions, seminars, and other formal or informal events from wherever they happen to be at the time. This flexibility can be particularly helpful during the review and production stages of major projects, when deadlines are looming and decisions and revisions need to be made quickly.

Mobile collaboration systems can now do virtually everything computer-based systems can do.

An important aspect of mobile collaboration and mobile communication in general is **unified communication**, which integrates such capabilities as voice and video calling, voice and video conferencing, instant messaging, and real-time collaboration software into a single system. By minimizing or eliminating the need to manage multiple communication systems and devices, unified communication promises to improve response times, productivity, and collaboration efforts.[20]

## GIVING—AND RESPONDING TO—CONSTRUCTIVE FEEDBACK

Aside from processes and tools, collaborative communication often involves giving and receiving feedback about writing efforts. **Constructive feedback**, sometimes called *constructive criticism*, focuses on the process and outcomes of communication, not on the people involved (see Table 2.1). In contrast, **destructive feedback** delivers criticism with no effort to stimulate improvement.[21] For example, "This proposal is a confusing mess, and you failed to convince me of anything" is destructive feedback. Your goal is to be more constructive: "Your proposal could be more effective with a clearer description of the manufacturing process and a well-organized explanation of why the positives outweigh the negatives." When giving feedback, avoid personal attacks and give the person clear guidelines for improvement.

When you give writing feedback, make it constructive by focusing on how the material can be improved.

When you receive constructive feedback, resist the urge to defend your work or deny the validity of the feedback. Remaining open to criticism isn't easy when you've poured

When you receive constructive feedback on your writing, keep your emotions in check and view it as an opportunity to improve.

TABLE 2.1 **Giving Constructive Feedback**

| How to Be Constructive | Explanation |
|---|---|
| Think through your suggested changes carefully. | Because many business documents must illustrate complex relationships between ideas and other information, isolated and superficial edits can do more harm than good. |
| Discuss improvements rather than flaws. | Instead of saying "this is confusing," for instance, explain how the writing can be improved to make it clearer. |
| Focus on controllable behavior. | The writer may not have control over every variable that affected the quality of the message, so focus on those aspects the writer can control. |
| Be specific. | Comments such as "I don't get this" or "Make this clearer" don't give the writer much direction. |
| Keep feedback impersonal. | Focus comments on the message, not on the person who created it. |
| Verify understanding. | If in doubt, ask for confirmation from the recipient to make sure that the person understood your feedback. |
| Time your feedback carefully. | Respond in a timely fashion so that the writer will have sufficient time to implement the changes you suggest. |
| Highlight any limitations your feedback may have. | If you didn't have time to give the document a thorough edit, or if you're not an expert in some aspect of the content, let the writer know so that he or she can handle your comments appropriately. |

your heart and soul into a project, but good feedback provides a valuable opportunity to learn and to improve the quality of your work.

## Making Your Meetings More Productive

3 LEARNING OBJECTIVE
List the key steps needed to ensure productive team meetings, and identify the most common meeting technologies.

Much of your workplace communication will occur during in-person or online meetings. To a large degree, your ability to contribute to the company—and to be recognized for your contributions—will depend on your meeting skills. Well-run meetings can help companies solve problems, develop ideas, and identify opportunities. Meetings can also be a great way to promote team building through the experience of social interaction.[22]

### PREPARING FOR MEETINGS

A single poorly planned or poorly run meeting can waste hundreds or thousands of dollars, so make sure every meeting is necessary and well managed.

To ensure a successful meeting, clarify your purpose, select the right mix of participants, choose the venue and time carefully, and set a clear agenda.

The first step in preparing for a meeting is to make sure the meeting is really necessary. Meetings can consume hundreds or thousands of dollars of productive time and take people away from other work, so don't hold a meeting if some other form of communication (such as an email message) can serve the purpose as effectively.[23] If a meeting is truly necessary, proceed with these four planning tasks:

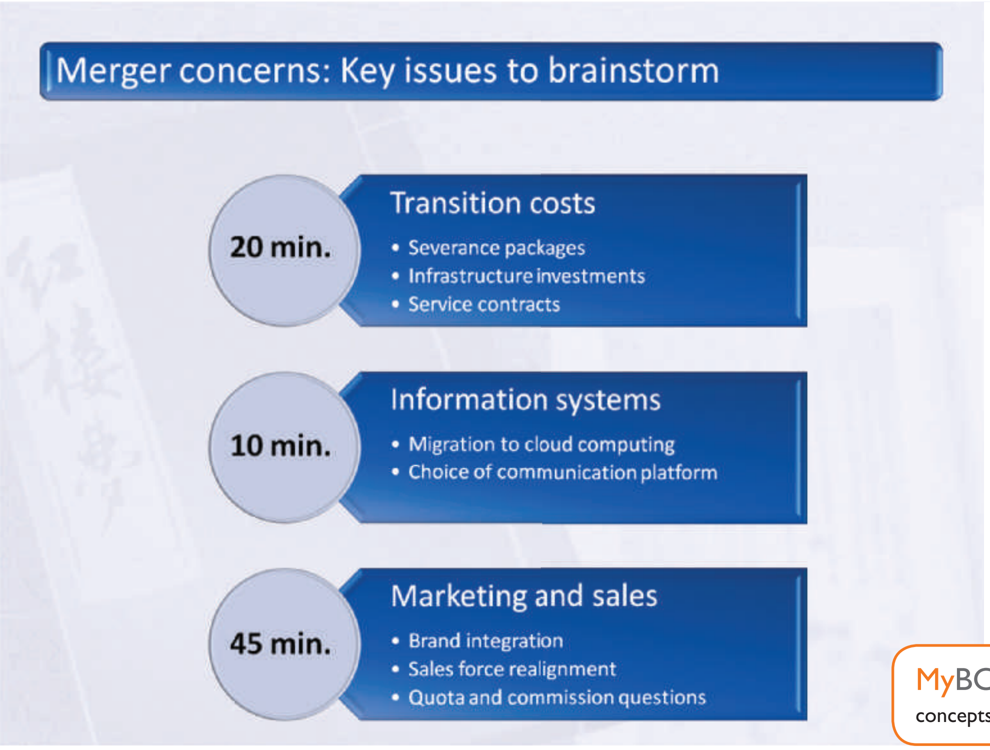
- **Clarify your purpose.** Most meetings are one of two types: *Informational meetings* involve sharing information and perhaps coordinating action. *Decision-making meetings* involve analysis, problem solving, and in many cases, persuasive communication. Whatever your purpose, make sure it is clear and specific—and clearly communicated to all participants.
- **Select participants for the meeting.** The rule here is simple: Invite everyone who really needs to be involved, and don't invite anyone who doesn't. For decision-making meetings, for example, invite only those people who are in a direct position to help the meeting reach its objective.
- **Choose the venue and the time.** Online meetings are often the best way (and sometimes the only way) to connect people in multiple locations or to reach large audiences. For on-site meetings, review the facility and the seating arrangements. Are rows of chairs suitable, or do you need a conference table or some other arrangement? Pay attention to room temperature, lighting, ventilation, acoustics, and refreshments. These details can make or break a meeting. If you have control over the timing, morning meetings are often more productive because people are generally more alert and not yet engaged with the work of the day.
- **Set and share the agenda.** People who will be presenting information need to know what is expected of them, nonpresenters need to know what will be presented so they can prepare questions, and everyone needs to know how long the meeting will last. In addition, the agenda is an important tool for guiding the progress of the meeting (see Figure 2.2).

### CONDUCTING AND CONTRIBUTING TO EFFICIENT MEETINGS

Everyone shares the responsibility for successful meetings.

Everyone in a meeting shares the responsibility for keeping the meeting productive and making it successful. If you are the designated leader of a meeting, however, you have an extra degree of responsibility and accountability. To ensure productive meetings, be sure to do the following:

- **Keep the meeting on track.** A good meeting draws out the best ideas and information the group has to offer. Good leaders occasionally need to guide, mediate, probe, stimulate, summarize, and redirect discussions that have gotten off track.
- **Follow agreed-upon rules.** The larger the meeting, the more formal you'll need to be to maintain order. Formal meetings often use *parliamentary procedure*, a time-tested method for planning and running effective meetings. The best-known guide to this procedure is *Robert's Rules of Order*.




The agenda title clearly identifies the scope of the meeting.

The clear and concise outline format identifies the topics that will be addressed and the order of discussion, which helps participants plan questions and suggestions.

Establishing a time limit for each section helps keep the meeting on track and ensures that time will be available for every topic.

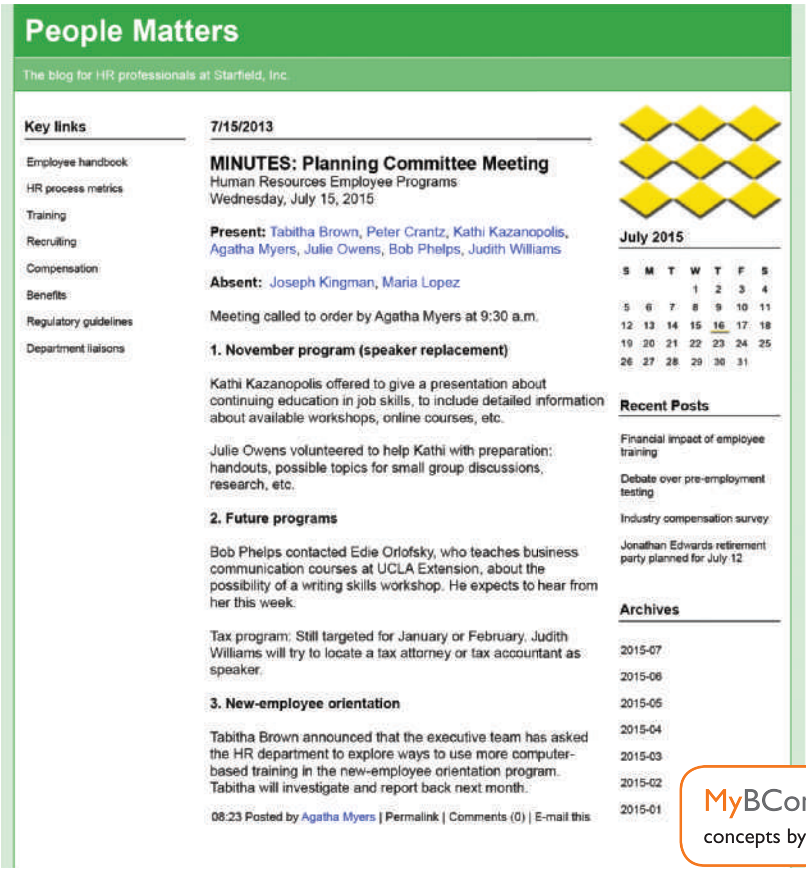
MyBCommLab Apply Figure 2.2's key concepts by going to **mybcommlab.com**

**Figure 2.2 Typical Meeting Agenda**
Agenda formats vary widely, depending on the complexity of the meeting and the presentation technologies that will be used. One good approach is to first distribute a detailed planning agenda so that presenters know what they need to prepare, then create a simpler display agenda such as this PowerPoint slide to guide the progress of the meeting. Note how the agenda includes the time limit for each topic.

- **Encourage participation.** You may discover that some participants are too quiet and others are too talkative. Draw out nonparticipants by asking for their input. For the overly talkative, you can say that time is limited and others need to be heard.
- **Participate actively.** Try to contribute to the progress of the meeting and the smooth interaction of the participants. Use your listening skills and powers of observation to size up the interpersonal dynamics of the group, then adapt your behavior to help the group achieve its goals. Speak up if you have something useful to say, but don't talk or ask questions just to demonstrate how much you know about the subject at hand.
- **Use mobile devices respectfully.** Tweeting key points from a convention speech or using your phone to jot down essential ideas and follow-up questions can be productive and respectful ways to use a device during a meeting. Checking Facebook or working on unrelated tasks is not. If you intend to use your device to take notes during a meeting, consider letting the meeting leader know that's what you're doing.[24]
- **Close effectively.** At the conclusion of a meeting, verify that the objectives have been met. If they have not, arrange for follow-up work as needed. Either summarize the decisions reached or list the actions to be taken. Make sure all participants understand and agree on the outcome.

## PUTTING MEETING RESULTS TO PRODUCTIVE USE

In most cases, the value of a meeting doesn't end when the meeting ends. For example, problems or opportunities brought up during a meeting need to be addressed, any action items assigned during the meeting need to be acted on, and key decisions and announcements should be distributed to anyone who is affected but was unable to attend. Having a written, audio, or video record of a meeting also gives the participants a chance to verify their impressions and conclusions.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7/15/2013

**MINUTES: Planning Committee Meeting**
Human Resources Employee Programs
Wednesday, July 15, 2015

**Present:** Tabitha Brown, Peter Crantz, Kathi Kazanopolis, Agatha Myers, Julie Owens, Bob Phelps, Judith Williams

**Absent:** Joseph Kingman, Maria Lopez

Meeting called to order by Agatha Myers at 9:30 a.m.

**1. November program (speaker replacement)**

Kathi Kazanopolis offered to give a presentation about continuing education in job skills, to include detailed information about available workshops, online courses, etc.

Julie Owens volunteered to help Kathi with preparation: handouts, possible topics for small group discussions, research, etc.

**2. Future programs**

Bob Phelps contacted Edie Orlofsky, who teaches business communication courses at UCLA Extension, about the possibility of a writing skills workshop. He expects to hear from her this week.

Tax program: Still targeted for January or February. Judith Williams will try to locate a tax attorney or tax accountant as speaker.

**3. New-employee orientation**

Tabitha Brown announced that the executive team has asked the HR department to explore ways to use more computer-based training in the new-employee orientation program. Tabitha will investigate and report back next month.

08:23 Posted by Agatha Myers | Permalink | Comments (0) | E-mail this

July 2015

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The heading and subheading clearly identify the specific meeting, so there is no confusion about which meeting these minutes are for.

Listing the invited participants who did and did not attend clarifies the record in case any of the decisions made are questioned later on.

Concise summaries of each discussion serve as the official record of the meeting, in case there is confusion or disagreement about what was discussed and the details of any decisions or task assignments.

MyBCommLab Apply Figure 2.3's key concepts by going to **mybcommlab.com**

**Figure 2.3 Typical Meeting Minutes**
The specific format of meeting minutes is less important than making sure you record all the key information, particularly regarding responsibilities assigned during the meeting. No matter what medium is used, key elements of meeting minutes include a list of those present and a list of those who were invited but didn't attend, followed by the times the meeting started and ended, all major decisions reached at the meeting, all assignments of tasks to meeting participants, and all subjects that were deferred to a later meeting. Minutes objectively summarize important discussions, noting the names of those who contributed major points. Outlines, subheadings, and lists help organize the minutes; additional documentation is noted in the minutes and attached.

Minutes are a written summary of the key discussion points and decisions made during a meeting.

The conventional method of recording meetings is through written **minutes**, a summary of the important information presented and the decisions made (see Figure 2.3). One person is usually assigned to keep notes as the meeting progresses and then to share them afterward. The specific format of the minutes is less important than making sure you record all the key information, particularly regarding responsibilities that were assigned during the meeting. Typical elements include a list of those present and a list of those who were invited but didn't attend, followed by the times the meeting started and ended, all major decisions reached at the meeting, all assignments of tasks to meeting participants, and all subjects that were deferred to a later meeting. In addition, the minutes objectively summarize important discussions, noting the names of those who contributed major points. Any handouts, electronic slides, or supporting documents can be attached to the minutes when they are distributed.

Depending on the meeting technologies at your disposal (see next section), you may have software specifically designed to record, distribute, and store meeting minutes. Some systems automatically forward action items to each employee, record audio discussions for future playback, and make all the relevant documents and files available in one convenient place.[25]

## USING MEETING TECHNOLOGIES

Expect to participate in many virtual meetings using a variety of online meeting technologies.

Today's companies use a number of technologies to enhance or even replace traditional in-person meetings. Replacing in-person meetings with **virtual meetings** can dramatically reduce costs and resource usage, reduce wear and tear on employees, and give teams access to a wider pool of expertise.

**Figure 2.4 Telepresence**
How many people are actually in this conference room in Chicago? Only the two people in the foreground are in the room; the other six are in Atlanta and London. Virtual meeting technologies such as this telepresence system connect people spread across the country or around the world.
*Source:* Peter Wynn Thompson/The New York Times/Redux.

Instant messaging (IM) and teleconferencing are the simplest forms of virtual meetings. Videoconferencing lets participants see and hear each other, demonstrate products, and transmit other visual information. *Telepresence* (see Figure 2.4) enables realistic conferences in which participants thousands of miles apart almost seem to be in the same room.[26] The ability to convey nonverbal subtleties such as facial expressions and hand gestures makes these systems particularly good for negotiations, collaborative problem solving, and other complex discussions.[27]

The most sophisticated web-based meeting systems combine the best of real-time communication, shared workspaces, and videoconferencing with other tools, such as *virtual whiteboards*, that let teams collaborate in real time. Such systems are used for everything from spontaneous discussions among small groups to carefully planned formal events such as press conferences, training sessions, sales presentations, and *webinars* (web-based seminars).[28] One of the newest virtual tools is online brainstorming, in which a company can conduct "idea campaigns" to generate new ideas from people across the organization.

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WebEx Mobile gives you mobile access to one of the world's most popular online meeting platforms.

Conducting successful virtual meetings requires extra planning before the meeting and more diligence during the meeting. Recognizing the limitations of the virtual meeting format is a key to using it successfully.[29] Because virtual meetings offer less visual contact and nonverbal communication than in-person meetings, leaders need to make sure everyone stays engaged and has the opportunity to contribute. Paying attention during online meetings takes greater effort as well. Participants need to stay committed to the meeting and resist the temptation to work on unrelated tasks.[30]

Online meetings can save a lot of time and money, but they require extra planning and management steps.

For the latest information on meeting technologies, visit **http://real-timeupdates.com/bce7** and click on Chapter 2.

## Improving Your Listening Skills

**4 LEARNING OBJECTIVE**
Describe the listening process, and explain how good listeners overcome barriers at each stage of the process.

Your long-term career prospects are closely tied to your ability to listen effectively. In fact, some 80 percent of top executives say that listening is the most important skill needed to get things done in the workplace.[31] Plus, today's younger employees place a high premium on being heard, so listening is becoming even more vital for managers.[32]

Effective listening strengthens organizational relationships, alerts the organization to opportunities for innovation, and allows the organization to manage growing diversity both in the workforce and in the customers it serves.[33] Companies whose employees and

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managers listen effectively are able to stay informed, up, to date, and out of trouble. Conversely, poor listening skills can cost companies millions of dollars per year as a result of lost opportunities, legal mistakes, and other errors. Effective listening is also vital to the process of building trust between organizations and between individuals.[34]

## RECOGNIZING VARIOUS TYPES OF LISTENING

Listening is one of the most important skills in the workplace, but most people don't do it as well as they assume they do.

To be a good listener, adapt the way you listen to suit the situation.

Effective listeners adapt their listening approaches to different situations. The primary goal of **content listening** is to understand and retain the information in the speaker's message. With this type of listening, you ask questions to clarify the material but don't argue or judge. Try to overlook the speaker's style and any limitations in the presentation; just focus on the information.[35]

The goal of **critical listening** is to understand and evaluate the meaning of the speaker's message on several levels: the logic of the argument, the strength of the evidence, the validity of the conclusions, the implications of the message for you and your organization, the speaker's intentions and motives, and the omission of any important or relevant points. Be on the lookout for bias that might color the way the information is presented, and be careful to separate opinions from facts.[36] (Note that "critical listening" does not mean you are listening with the intent to criticize, but rather to understand the full meaning and implications of the speaker's message.)

The goal of **empathic listening** is to understand the speaker's feelings, needs, and wants so that you can appreciate his or her point of view, regardless of whether you share that perspective. By listening in an empathic way, you help the individual release emotions that can prevent a calm, clear-headed approach to the subject. Don't jump in with advice unless the person asks for it, and don't judge the speaker's feelings. Instead, let the person know that you appreciate his or her feelings and understand the situation. After you establish that connection, you can then help the speaker search for a solution.[37]

No matter what mode they are using at any given time, effective listeners try to engage in **active listening**, making a conscious effort to turn off their own filters and biases to truly hear and understand what the other party is saying. They ask questions or summarize the speaker's message to verify key points and encourage the speaker through positive body language and supportive feedback.[38]

## UNDERSTANDING THE LISTENING PROCESS

Listening is a far more complex process than most people think—and most of us aren't very good at it. People typically listen at no better than a 25 percent efficiency rate, remember only about half of what's said during a 10-minute conversation, and forget half of that within 48 hours.[39] Furthermore, when questioned about material they've just heard, they are likely to get the facts mixed up.[40]

Why is such a seemingly simple activity so difficult? The reason is that listening is not a simple process, by any means. Listening follows the same sequence as the basic communication process model you explored in Chapter 1 (page 53), with the added difficulty that it happens in real time. To listen effectively, you need to successfully complete five steps:[41]

Listening involves five steps: receiving, decoding, remembering, evaluating, and responding.

1. **Receiving.** Physically hear the message and recognize it as incoming information.
2. **Decoding.** Assign meaning to sounds, according to your own values, beliefs, ideas, expectations, roles, needs, and personal history.
3. **Remembering.** Store the information for future processing.
4. **Evaluating.** Analyze the quality of the information.
5. **Responding.** React based on the situation and the nature of the information.

If any one of these steps breaks down, the listening process becomes less effective or even fails entirely. As both a sender and a receiver, you can reduce the failure rate by recognizing and overcoming a variety of physical and mental barriers to effective listening.

TABLE 2.2 | **What Makes an Effective Listener?**

| Effective Listeners | Ineffective Listeners |
|---|---|
| • Listen actively | • Listen passively |
| • Take careful and complete notes, when applicable | • Take no notes or ineffective notes |
| • Make frequent eye contact with the speaker (depends on culture to some extent) | • Make little or no eye contact—or inappropriate eye contact |
| • Stay focused on the speaker and the content | • Allow their minds to wander, are easily distracted, work on unrelated tasks |
| • Mentally paraphrase key points to maintain attention level and ensure comprehension | • Fail to paraphrase |
| • Adjust listening style to the situation | • Listen with the same style, regardless of the situation |
| • Give the speaker nonverbal cues (such as nodding to show agreement or raising eyebrows to show surprise or skepticism) | • Fail to give the speaker nonverbal feedback |
| • Save questions or points of disagreement until an appropriate time | • Interrupt whenever they disagree or don't understand |
| • Overlook stylistic differences and focus on the speaker's message | • Are distracted by or unduly influenced by stylistic differences; are judgmental |
| • Make distinctions between main points and supporting details | • Unable to distinguish main points from details |
| • Look for opportunities to learn | • Assume they already know everything that's important to know |

*Sources:* Adapted from Madelyn Burley-Allen, *Listening: The Forgotten Skill* (New York: Wiley, 1995), 70–71, 119–120; Judi Brownell, *Listening: Attitudes, Principles, and Skills* (Boston: Allyn & Bacon, 2002); 3, 9, 83, 89, 125; Larry Barker and Kittie Watson, *Listen Up* (New York: St. Martin's, 2000), 8, 9, 64.

### OVERCOMING BARRIERS TO EFFECTIVE LISTENING

Good listeners actively try to overcome the barriers to successful listening.

Good listeners look for ways to overcome the many potential barriers to successful listening (see Table 2.2). Some factors you may not be able to control, such as conference room acoustics or poor phone reception. However, you can control other factors, such as not interrupting speakers, not multitasking when someone is talking to you, and not creating distractions that make it difficult for others to pay attention. And don't think that you're not interrupting just because you're not talking. Such actions as sighing or checking your watch can interrupt a speaker and lead to communication breakdowns.

**Selective listening** is one of the most common barriers to effective listening. If your mind wanders, you may stay tuned out until you hear a word or phrase that gets your attention once more. But by that time, you'll be unable to recall what the speaker *actually* said; instead, you'll remember what you think the speaker *probably* said.[42]

One reason listeners' minds tend to wander is that people think faster than they speak. Most people speak at 120 to 150 words per minute. However, listeners can process audio information at up to 500 words per minute or more.[43] Consequently, your brain has a lot of free time whenever you're listening, and if left unsupervised, it will find a thousand other things to think about. Make a conscious effort to focus on the speaker, and use the extra time to analyze and paraphrase what you hear or to take relevant notes.

Overcoming interpretation barriers can be difficult because you may not even be aware of them. **Selective perception** leads listeners to mold messages to fit their own conceptual frameworks. Listeners sometimes make up their minds before fully hearing the speaker's message, or they engage in *defensive listening*—protecting their egos by tuning out anything that doesn't confirm their beliefs or their view of themselves.

Even when your intentions are good, you can still misinterpret incoming messages if you and the speaker don't share enough language or experience. When listening to a speaker whose native language or life experience is different from yours, try to paraphrase that person's ideas. Give the speaker a chance to confirm what you think you heard or to correct any misinterpretation.

## Improving Your Nonverbal Communication Skills

5 LEARNING OBJECTIVE
Explain the importance of nonverbal communication, and identify six major categories of nonverbal expression.

**Nonverbal communication** is the process of sending and receiving information, both intentionally and unintentionally, without using written or spoken language. Nonverbal signals play a vital role in communication because they can strengthen a verbal message

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(when the nonverbal signals match the spoken words), weaken a verbal message (when nonverbal signals don't match the words), or replace words entirely. For example, you might tell a client that a project is coming along nicely, but your forced smile and nervous glances will send an entirely different message.

You've been tuned in to nonverbal communication since your first contact with other human beings. Paying special attention to nonverbal signals in the workplace will enhance your ability to communicate successfully. Moreover, as you work with a diverse range of people in the global marketplace, you'll also need to grasp the different meanings of common gestures, expressions, and other signals in various cultures. Six types of signals are particularly important:

Nonverbal communication can strengthen, weaken, or sometimes even replace written or spoken communication.

Nonverbal signals include facial expression, gestures and posture, vocal characteristics, personal appearance, touch, and use of time and space.

- **Facial expressions.** Your face is the primary site for expressing your emotions; it reveals both the type and the intensity of your feelings.[44] Your eyes are especially effective for indicating attention and interest, influencing others, regulating interaction, and establishing dominance.[45] As with other areas of nonverbal expressions, facial signals can vary widely from culture to culture. For instance, maintaining eye contact is usually viewed as a sign of sincerity and openness in the United States, but it can be viewed as rude in Japan.[46]
- **Gestures and postures.** Many gestures—a wave of the hand, for example—have a specific and intentional meaning. Other types of body movement are often unintentional and express more general messages. Slouching, leaning forward, fidgeting, and walking briskly are all unconscious signals that can reveal whether you feel confident or nervous, friendly or hostile, assertive or passive, powerful or powerless.
- **Vocal characteristics.** Voice carries both intentional and unintentional messages. A speaker can intentionally control pitch, pace, and stress to convey a specific message. For instance, compare "*What* are you doing?" and "What are *you* doing?" Unintentional vocal characteristics can convey happiness, surprise, fear, and other emotions. For example, fear often increases the pitch and the pace of your speaking voice.
- **Personal appearance.** People respond to others on the basis of their physical appearance, sometimes fairly and other times unfairly. Although an individual's body type and facial features impose limitations, most people are able to control their appearance to some degree. Grooming, clothing, accessories, piercings, tattoos, hairstyle—you can control all of these. Many employers also have guidelines concerning attire, body art, and other issues, so make sure you understand and follow them.[47]
- **Touch.** Touch is an important way to convey warmth, comfort, and reassurance—as well as control. Touch is so powerful, in fact, that it is governed by cultural customs that establish who can touch whom and how in various circumstances. In the United States and Great Britain, for instance, people usually touch less frequently than people in France or Costa Rica do. Even within each culture's norms, however, individual attitudes toward touch vary widely. A manager might be comfortable using hugs to express support or congratulations, but his or her subordinates could interpret those hugs as a show of dominance or sexual interest.[48] Touch is a complex subject. The best advice: When in doubt, don't touch.
- **Time and space.** Like touch, time and space can be used to assert authority, imply intimacy, and send other nonverbal messages. For instance, some people try to demonstrate their own importance or disregard for others by making other people wait; others show respect by being on time. Similarly, taking care not to invade private space, such as standing too close when talking, is a way to show respect for others. Keep in mind that expectations regarding both time and space vary by culture.

The way somebody says something can mean as much as the words he or she uses.

If you want to appear professional and confident in business settings, learn the behavioral expectations in your workplace.

When you listen to others, be sure to pay attention to nonverbal clues. Do these signals seem to support the spoken words or contradict them? Is the speaker intentionally using nonverbal signals to send you a message that he or she can't put into words? Be observant, but don't assume that you can "read someone like a book." Nonverbal signals are powerful, but they aren't infallible. For example, contrary to popular belief, avoiding eye contact and covering one's face while talking are not reliable clues that someone is lying. These behaviors may be influenced by culture or might just be ways of coping with stressful situations.[49]

Think carefully about the entire package of nonverbal signals you send to those around you. For instance, are you talking like a serious business professional but dressing like you belong in a dance club or a frat house? If your goal is to make a good impression, adopt the style of the people you want to impress. Whether or not you think it is fair to be judged on superficial matters, the truth is that you are judged this way. Don't let careless choices or disrespectful habits undermine all the great work you're doing on the job.

Make sure the nonverbal signals you send don't undermine your efforts to succeed on the job.

# Developing Your Business Etiquette

6 LEARNING OBJECTIVE Explain the importance of business etiquette, and identify four key areas in which good etiquette is essential.

You may have noticed a common thread running through the topics of successful teamwork, productive meetings, effective listening, and nonverbal communication: They all depend on mutual respect and consideration among all participants. Nobody wants to work with someone who is rude to colleagues or an embarrassment to the company. Moreover, shabby treatment of others in the workplace can be a huge drain on morale and productivity.[50] Poor etiquette can drive away customers, investors, and other critical audiences—and it can limit your career potential.

This section addresses some key etiquette points to remember when you're in the workplace, out in public, and online. Long lists of etiquette rules can be difficult to remember, but you can get by in most every situation by remembering to be aware of your effect on others, treating everyone with respect, and keeping in mind that the impressions you leave behind can have a lasting effect on you and your company. As etiquette expert Cindy Post Senning points out, "The principles of respect, consideration, and honesty are universal and timeless."[51]

Etiquette may sound like a fussy, old-fashioned idea, but it is really just a matter of showing respect for other people.

## BUSINESS ETIQUETTE IN THE WORKPLACE

Workplace etiquette includes a variety of behaviors, habits, and aspects of nonverbal communication. Although it isn't always thought of as an element of etiquette, your personal appearance in the workplace sends a strong signal to managers, colleagues, and customers. Pay attention to the style of dress where you work and adjust your style to match. Observe others and don't be afraid to ask for advice. It's not a question of mindlessly conforming or surrendering your individuality; it's a question of showing respect for an organizational culture that is bigger than you (see Figure 2.5). If you're not sure, dress modestly and simply—earn a reputation for what you *do*, not for what you wear.

**Figure 2.5 Showing Respect for Organizational Culture**
Being aware of expectations for personal appearance in a business setting is not only a sign of respect, it will help keep you from making career-limiting mistakes.
*Source:* Paul Bradbury/OJO Images Ltd/Alamy.

Grooming is as important as attire. Pay close attention to cleanliness and avoid using products with powerful scents, such as perfumed soaps, colognes, shampoos, and after-shave lotions. Many people are bothered by these products, and some are allergic to them.

Your telephone skills will be vital to your business success.

IM and other text-based tools have taken over many exchanges that used to take place over the phone, but phone skills are still essential. Because phone calls lack the visual richness of face-to-face conversations, you have to rely on your attitude and tone of voice to convey confidence and professionalism. Here are some important tips for using phones at work (for etiquette points specifically about mobile devices, see page 93):[52]

Basic courtesy on the phone makes communication more efficient and more pleasant for everyone involved.

- **Be conscious of how your voice sounds.** Don't speak in a monotone; vary your pitch and inflections so people know you're interested. Slow down when conversing with people whose native language isn't the same as yours.
- **Be courteous when you call someone.** Identify yourself and your organization, briefly describe why you're calling, and verify that you've called at a good time. Minimize the noise level in your environment as much as possible. For important or complicated conversations, plan what you want to say before calling.
- **Convey a positive, professional attitude when you answer the phone.** Answer promptly and with a smile so that you sound welcoming. Identify yourself and your company (some companies have specific instructions for what to say when you answer). Establish the needs of your caller by asking, "How may I help you?" If you know the caller's name, use it. If you can't answer the caller's questions, either forward the call to a colleague who can or advise the caller on how to get his or her questions resolved. If you do forward a call, put the caller on hold and call the next person yourself to verify that he or she is available.
- **End calls with courtesy and clarity.** Close in a friendly, positive manner and double-check all vital information such as meeting times and dates.
- **Use your own voicemail features to help callers.** Record a brief, professional-sounding outgoing message for regular use. When you will be away or unable to answer the phone for an extended period, record a temporary greeting that tells callers when you will respond to their messages. If you don't check your messages regularly or at all, disable your voicemail so callers won't be left waiting to hear from you and wondering if you received their messages. Letting voicemail messages pile up for days or weeks without answering them is extremely thoughtless.
- **Be considerate when leaving voicemail messages.** Retrieving voicemail messages can be a chore, so be thoughtful about leaving them. Unless voicemail is the best or only choice, consider leaving a message through other means, such as text messaging or email. If you do leave a voicemail message, make it as brief as possible. Leave your name, number (don't assume the recipient has caller ID), reason for calling, and times you can be reached. State your name and telephone number slowly so the other person can easily write them down; repeat both if the other person doesn't know you.

If you never or rarely check your voicemail, disable it or record an outgoing message advising callers to reach you another way.

## BUSINESS ETIQUETTE IN SOCIAL SETTINGS

You represent your company when you're out in public—or communicating online under your own name—so etiquette continues to be important even after you leave the office.

From business lunches to industry conferences, you may be asked to represent your company when you're out in public. Make sure your appearance and actions are appropriate to the situation. Get to know the customs of the culture when you meet new people. For example, in North America, a firm handshake is expected when two people meet, whereas a respectful bow is more appropriate in Japan. If you are expected to shake hands, be aware that the passive "dead fish" handshake creates an extremely negative impression with most people. If you are physically able, always stand when shaking someone's hand.

When introducing yourself, include a brief description of your role in the company. When introducing two other people, speak their first and last names clearly and then try to offer some information (perhaps a shared professional interest) to help the two people ease into a conversation.[53] Generally speaking, the lower-ranking person is introduced to the senior-ranking person, without regard to gender.[54]

**MOBILE APPS**

The Etiquette App helps you make appropriate choices in a variety of social and business situations.

Business is often conducted over meals, and knowing the basics of dining etiquette will make you more effective and comfortable in these situations.[55] Start by choosing foods that are easy to eat. Avoid alcoholic beverages in most instances, but if drinking one is appropriate, save it for the end of the meal. Leave business documents under your chair until entrée plates have been removed; the business aspect of the meal doesn't usually begin until then.

Remember that business meals are a forum for business, period. Don't discuss politics, religion, or any other topic that's likely to stir up emotions. Don't complain about work, don't ask deeply personal questions, avoid profanity, and be careful with humor—a joke that entertains some people could easily offend others.

When you represent your company online, you must adhere to a high standard of etiquette and respect for others.

## BUSINESS ETIQUETTE ONLINE

Electronic media seem to be a breeding ground for poor etiquette. Learn the basics of professional online behavior to avoid mistakes that could hurt your company or your career. Here are some guidelines to follow whenever you are representing your company while using electronic media:[56]

- **Avoid personal attacks.** The anonymous and instantaneous nature of online communication can cause even level-headed people to lose their tempers and go after others.
- **Stay focused on the original topic.** If you want to change the subject of an online conversation, start with a new message or thread.
- **Don't present opinions as facts; support facts with evidence.** This guideline applies to all communication, of course, but online venues in particular seem to tempt people into presenting their beliefs and opinions as unassailable truths.
- **Follow basic expectations of spelling, punctuation, and capitalization.** Sending careless, acronym-filled messages that look like you're texting your high school buddies makes you look like an amateur.
- **Use virus protection and keep it up to date.** Sending or posting a file that contains a computer virus puts others at risk.
- **Ask if this is a good time for an IM chat.** Don't assume that just because a person is showing as "available" on your IM system that he or she wants to chat at this moment.
- **Watch your language and keep your emotions under control.** A single indiscretion could haunt you forever.
- **Avoid multitasking while using IM or other tools.** You might think you're saving time by doing a dozen things at once, but you're probably making the other person wait while you bounce back and forth between IM and your other tasks.
- **Never assume you have privacy.** Assume that anything you type will be stored forever, could be forwarded to other people, and might be read by your boss or the company's security staff.
- **Don't use "reply all" in email unless everyone can benefit from your reply.** If one or more recipients of an email message don't need the information in your reply, remove their addresses before you send.
- **Don't waste others' time with sloppy, confusing, or incomplete messages.** Doing so is disrespectful.
- **Respect boundaries of time and virtual space.** For instance, don't start using an employee's personal Facebook page for business messages unless you've discussed it beforehand, and don't assume people are available to discuss work matters around the clock, even if you do find them online in the middle of the night.
- **Be careful of online commenting mechanisms.** For example, many blogs and websites now use your Facebook login to let you comment on articles. If your Facebook profile includes your job title and company name, those could show up along with your comment.

Respect personal and professional boundaries when using social networking tools.

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## BUSINESS ETIQUETTE USING MOBILE DEVICES

Like every other aspect of communication, your mobile device habits say a lot about how much respect you have for the people around you. Selecting obnoxious ringtones, talking

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loudly in open offices or public places, using your phone right next to someone else, making excessive or unnecessary personal calls during work hours, invading someone's privacy by using your phone's camera without permission, taking or making calls in restrooms and other inappropriate places, texting during a meal or while someone is talking to you, allowing incoming calls to interrupt meetings or discussions—these are all disrespectful choices that will reflect negatively on you.[57] In general, older employees, managers, and customers are less tolerant of mobile device use than are younger people, so don't assume that your habits will be universally acceptable.[58]

Virtual assistants, such as the Siri voice recognition system in Apple iPhones, raise another new etiquette dilemma. From doing simple web searches to dictating entire memos, these systems may be convenient for users, but they can create distractions and annoyances for other people.[59] As with other public behaviors, think about the effect you have on others before using these technologies.

Note that expectations and policies regarding mobile device use vary widely from company to company. At one extreme, venture capitalist Ben Horowitz fines his employees if they even look at a mobile device while an entrepreneur is making a business plan pitch, because he considers it disrespectful to people making presentations.[60] Not all bosses are quite so strict, but make sure you understand the situation in your workplace.

Your mobile phone habits send a signal about the degree of respect you have for those around you.

Virtual assistants and other mobile phone voice features can annoy and disrupt the workplace and social settings if not used with respect for others.

**MOBILE APPS**

Locale can "geofence" your smartphone, automatically changing settings based on your location—such as putting it into silent mode when you arrive at the your office.

# Chapter Review and Activities

## Learning Objectives: Check Your Progress

**Objective 1: List the advantages and disadvantages of working in teams, and describe the characteristics of effective teams.**

The advantages of successful teamwork include improved productivity, creativity, and employee involvement; increased information and knowledge; greater diversity of views; and increased acceptance of new solutions and ideas. The potential disadvantages of working in teams include groupthink (the tendency to let peer pressure overcome one's better judgment), the pursuit of hidden agendas, and the cost (in money and time) of planning and conducting team activities. The most effective teams have a clear objective, a shared sense of purpose, full engagement from all team members, procedures for reaching decisions by consensus, the right mix of creative and technical talents for the tasks at hand, and the ability to communicate well.

**Objective 2: Offer guidelines for collaborative communication, identify major collaboration technologies, and explain how to give constructive feedback.**

To succeed with collaborative writing, (1) select team members carefully to balance talents and viewpoints; (2) agree on project goals; (3) make sure team members have time to get to know one another; (4) make sure that everyone clearly understands individual responsibilities, processes, and tools; (5) generally, avoid writing as a group (assign the writing phase to one person, or assign separate sections to individual writers and have one person edit them all); (6) make sure tools and techniques are compatible; and (7) check in with everyone periodically.

Some of the major collaboration technologies are review and commenting features in document preparation software, wikis, content management systems, groupware, and shared workspaces.

When you are asked to give feedback on someone's writing, focus on how the writing can be improved. Avoid personal attacks and give the person clear and specific advice.

**Objective 3: List the key steps needed to ensure productive team meetings, and identify the most common meeting technologies.**

Meetings are an essential business activity, but they can waste time and money if conducted poorly. Help your company make better use of meetings by preparing carefully, conducting meetings efficiently, and using meeting technologies wisely. Make sure your meetings are necessary, are carefully planned, include only the necessary participants, and follow clear agendas.

A variety of meeting technologies are available to help teams and other groups communicate more successfully. The primary advantage of these tools is the ability to conduct virtual meetings that don't require everyone to be in the same place at the same time. The tools range from simple instant messaging sessions and teleconferences to videoconferencing and web-based meetings to specialized capabilities such as online brainstorming systems.

**Objective 4: Describe the listening process, and explain how good listeners overcome barriers at each stage of the process.**

The listening process involves five steps: receiving, decoding, remembering, evaluating, and responding. At any stage, barriers can disrupt the process, so good listeners practice active listening, avoid disrupting the speaker or other people, work hard to see past superficial differences and distractions, and take care not to let selective perception filter out important information.

**Objective 5: Explain the importance of nonverbal communication, and identify six major categories of nonverbal expression.**

Nonverbal signals play a vital role in communication because they can strengthen a verbal message (when the nonverbal signals match the spoken words), weaken a verbal message (when nonverbal signals don't match the words), or replace words entirely. The six major categories of nonverbal expression are facial expressions, gestures and posture, vocal characteristics, personal appearance, touch, and use of time and personal space.

**Objective 6: Explain the importance of business etiquette, and identify four key areas in which good etiquette is essential.**

Etiquette is an essential business skill because the impression you make on others and your ability to help others feel comfortable will be major contributors to your career success. Poor etiquette can hinder team efforts, drain morale and productivity, drive away customers and investors, and limit your career potential. Four key areas that require good business etiquette are in the workplace, in social settings in which you represent your company, in online venues, and while using mobile devices.

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## Test Your Knowledge

To review chapter content related to each question, refer to the indicated Learning Objective.

**2-1.** What are six characteristics of effective teams? [LO-1]

**2-2.** What steps would you take to make a meeting more productive? [LO-3]

**2-3.** What are the skills you need to be an effective listener? [LO-4]

**2-4.** What are the six main categories of nonverbal signals? [LO-5]

**2-5.** How do your mobile phone habits demonstrate your sensitivity to business etiquette? [LO-6]

## Apply Your Knowledge

To review chapter content related to each question, refer to the indicated Learning Objective.

**2-6.** You head up the interdepartmental design review team for a manufacturer of high-performance motorcycles, and things are not going well at the moment. The design engineers and marketing strategists keep arguing about which should be a higher priority, performance or aesthetics, and the accountants say both groups are driving the cost of the new model through the roof by adding too many new features. Everyone has valid points to make, but the team is getting bogged down in conflict. Explain how you could go about resolving the stalemate. [LO-1]

**2-7.** Whenever your boss asks for feedback, she blasts anyone who offers criticism, so people tend to agree with everything she says. You want to talk to her about it, but what should you say? List some of the points you want to make when you discuss this issue with your boss. [LO-2]

**2-8.** As a regional sales executive, you have been sent to a tropical area where the climate is hot and dusty. Your company's corporate policy mandates that all executives wear a tie. However, you look like a fish out of water compared with competing sales personnel in the region, and your potential customers also find your attire inappropriate. How would you explain your corporate policy to these customers and leverage this to create a positive image of your company? Explain whether you could use this to also enhance price acceptance of your premium products for that region. [LO-6]

**2-9.** Your company provides several mobile productivity apps for employees so they can access the company network and collaborate while working from home, waiting for trains, and during other times when they are away from their desks. The apps work well, but lately you notice some of your employees using them during meetings and presentations to work on projects not related to those events. You explained to several employees that this behavior can be considered rude to speakers and fellow team members, but your employees protested that they have mountains of work to do and meetings are sometimes a waste of time. Explain how to respond to this dilemma.

## Practice Your Skills

### Activities

Each activity is labeled according to the primary skill or skills you will need to use. To review relevant chapter content, you can refer to the indicated Learning Objective. In some instances, supporting information will be found in another chapter, as indicated.

**2-10. Collaboration: Working in Teams [LO-1]** In teams assigned by your instructor, prepare a 10-minute presentation on the potential disadvantages of using social media for business communication. When the presentation is ready, discuss how effective the team was in using the criteria of (1) having a clear objective and a shared sense of purpose, (2) communicating openly and honestly, (3) reaching decisions by consensus, (4) thinking creatively, and (5) knowing how to resolve conflict. Be prepared to discuss your findings with the rest of the class.

**2-11. Collaboration: Using Collaboration Technologies [LO-2]** In a team assigned by your instructor, use Zoho (free for personal use) or a comparable system to collaborate on a set of directions that out-of-town visitors could use to reach a specific point on your campus, such as a stadium or dorm. The team should choose the location and the mode(s) of transportation involved.

Be creative—brainstorm the best ways to guide first-time visitors to the selected location using all the media at your disposal.

**2-12. Media Skills: Shared Workspace [LO-2]** The corporate office, marketing, and finance departments of your company are scattered across three locations in the city. There is a need to motivate and engage employees in an information exchange. Each department is requested to form a team and conduct a search on the Internet to find ways people could be motivated. Tabulate the findings of each team and narrow down to the 10 most popular motivational employee engagement activities that can be further discussed with the teams. Collaborate in a shared workspace with these departments on the details of these 10 best activities.

**2-13. Collaboration: Planning Meetings: Media Skills: Presentations [LO-3]** Suppose that you are a sales manager who needs to invite representatives for a zonal sales meeting to discuss performance and reward achievements. Prepare a schedule of points to be discussed by writing down items in logical order. Prepare a presentation of the agenda, to be emailed to colleagues, detailing items to be discussed. Details to include are as follows:

- Zonal sales meeting on January 12, 2015, at 9:00 a.m.
- Meeting at Hotel Meridian Plaza, ballroom
- Inaugural message by the chairman on performance and long-term vision at 9:05 a.m.
- Three territory managers to individually present the sales performance of their regions between 9:45 and 11.15 a.m.
- Top 10 achievers will then share their success stories for 10 minutes each.
- Finance will report on cost escalations and control measures between 2:00 and 3:00 p.m.
- Team-wise discussions on how to counter competition and setting of targets for the next year between 3:15 and 4:45 p.m.
- First tea break at 11.15 a.m.
- Second tea break at 4:45 p.m.
- Lunch between 1:10 and 2:00 p.m.
- Awards for 100% achievers and closing speech by the sales manager for 30 minutes each

**2-14. Collaboration: Participating in Meetings [LO-3]** With a classmate, attend a local community or campus meeting where you can observe group discussion. Take notes individually during the meeting and then work together to answer the following questions. Submit your conclusions in an email message to your instructor.

**a.** What is your evaluation of this meeting? In your answer, consider (1) the leader's ability to clearly state the meeting's goals, (2) the leader's ability to engage members in a meaningful discussion, and (3) the group's listening skills.

**b.** How well did the individual participants listen? How could you tell?

**c.** Compare the notes you took during the meeting with those of your classmate. What differences do you notice? How do you account for these differences?

**2-15. Collaboration: Leading Meetings [LO-3], Chapter 1** Every month, each employee in your department is expected to give a brief oral presentation on the status of his or her ongoing projects. However, your department has recently hired an employee who has a severe speech impediment that prevents people from understanding most of what he has to say. As assistant department manager, how will you resolve this dilemma? Explain your plan in an email message to your instructor.

**2-16. Interpersonal Communication: Listening Actively [LO-4]** Your name has been proposed for the position of school representative for the next academic term. You have been told by management to improve your listening abilities. Identify six areas of improvement and rate yourself on a scale of 1 to 5, where 1 = always, 2 = frequently, 3 = sometimes, 4 = rarely, 5 = never. Analyze the findings and prepare a report of not more than 250 words that communicates areas of improvement where you feel you should begin immediately.

**2-17. Interpersonal Communication: Listening to Empathize [LO-4]** Think back over conversations you have had with friends, family members, co-workers, or classmates in the past week. Select a conversation in which the other person wanted to talk about something that was troubling him or her—a bad situation at work, a scary exam on the horizon, difficulties with a professor, a health problem, financial concerns, or the like. As you replay this conversation in your mind, think about how well you did in terms of empathic listening (see page 88). For example, did you find yourself being critical when the person really just needed someone to listen? Did you let the person know, by your words or actions, that you cared about his or her dilemma, even if you were not able to help in any other way? Analyze your listening performance in a brief email to your instructor. Be sure not to disclose any private information; you can change the names of the people involved or the circumstances as needed to maintain privacy.

**2-18. Nonverbal Communication: Analyzing Nonverbal Signals [LO-5]** Select a piece of business mail that you received at work or at home. Analyze its appearance. What nonverbal messages does this piece send? Are these messages consistent with the content of the mailing? If not, what could the sender have done to make the nonverbal communication consistent with the verbal communication? Summarize your findings in a post on your class blog or in an email message to your instructor.

**2-19. Nonverbal Communication: Analyzing Nonverbal Signals [LO-5]** Explain what the following gestures or postures could mean when they are exhibited by someone during a conversation. How did you reach your conclusions about each nonverbal signal? How do such signals influence your interpretation of spoken words? Summarize your findings in a post on your class blog or in an email message to your instructor.

**a.** Shifting one's body continuously while seated
**b.** Twirling and playing with one's hair
**c.** Sitting in a sprawled position
**d.** Rolling one's eyes
**e.** Extending a weak handshake

**2-20. Communication Etiquette: Telephone Skills [LO-6]** Late on a Friday afternoon, you learn that the facilities department is going to move you—and your computer, your desk, and all your files—to another office first thing

Monday morning. However, you have an important client meeting scheduled in your office for Monday afternoon, and you need to finalize some contract details on Monday morning. You simply can't lose access to your office at that point, and you're more than a little annoyed that your boss didn't ask you before approving the move. He has already left for the day, but you know he usually checks his voicemail over the weekend, so you decide to leave a voicemail message, asking him to cancel the move or at least call you at home as soon as possible. Plan your message (use an imaginary phone number as your contact number and make up any other details you need for the call). As directed by your instructor, submit either a written script of the message or a recording of the actual message.

**2-21. Communication Etiquette: Etiquette in the Workplace [LO-6]** As the regional manager of an international accounting firm, you place high priority on professional etiquette. Not only does it communicate respect to your clients, it also instills confidence in your firm by showing that you and your staff are aware of and able to meet the expectations of almost any audience. Earlier today, you took four recently hired college graduates to lunch with an important client. You've done this for years, and it's usually an upbeat experience for everyone, but today's lunch was a disaster. One of the new employees made not one, not two, but *three* calls on his mobile phone during lunch without leaving the table. Another interrupted the client several times and even got into a mild argument. The third employee kept making sarcastic jokes about politics, making everyone at the table uncomfortable. And the fourth showed up dressed like she was expecting to bale hay or work in a coal mine, not have a business lunch in a posh restaurant. You've already called the client to apologize, but now you need to coach these employees on proper business etiquette. Draft a brief memo to these employees, explaining why etiquette is so important to the company's success—and to their individual careers.

# Expand Your Skills

## Critique the Professionals

Celebrities can learn from successful businesses when it comes to managing their careers, but businesses can learn from successful celebrities, too—particularly when it comes to building communities online using social media. For instance, social media guru Dan Schawbel cites Vin Diesel, Ashton Kutcher, Lady Gaga, Lenny Kravitz, and Michael Phelps as celebrities who have used Facebook to build their personal brands.[61] Locate three celebrities (musicians, actors, authors, or athletes) who have sizable fan bases on Facebook and analyze how they use the social network. Using whatever medium your instructor requests, write a brief analysis (no more than one page) of the lessons, positive or negative, that a business could learn from these celebrities. Be sure to cite specific elements from the Facebook pages you've chosen, and if you think any of the celebrities have made mistakes in their use of Facebook, describe those as well.

## Sharpen Your Career Skills Online

Bovée and Thill's Business Communication Web Search, at **http://websearch.businesscommunicationnetwork.com**, is a unique research tool designed specifically for business communication research. Use the Web Search function to find a website, video, PDF document, podcast, or presentation that explains at least one essential skill related to teamwork, collaborative writing, listening, nonverbal communication, or business etiquette. Write a brief email message to your instructor, describing the item you found and summarizing the career skills information you learned from it.

# Improve Your Grammar, Mechanics, and Usage

You can download the text of this assignment from **http://real-timeupdates.com/bce7**; click on Student Assignments, and then click on Chapter 2. Improve Your Grammar, Mechanics, and Usage.

## Level 1: Self-Assessment—Pronouns

Review Section 1.2 in the Handbook of Grammar, Mechanics, and Usage. Answers to these exercises appear on page 499.

For the following items, replace the underlined nouns with the correct pronouns.

**2-22.** To <u>which retailer</u> will you send your merchandise?
**2-23.** Have you given <u>John and Nancy</u> a list of parts?
**2-24.** The main office sent the invoice to <u>Mr. and Mrs. Litvak</u> on December 5.
**2-25.** The company settled <u>the company's</u> accounts before the end of the year.
**2-26.** Which person's umbrella is this?

For the following items, identify which of the pronoun forms provided in parentheses is correct.

**2-27.** The sales staff is preparing guidelines for (their, its) clients.
**2-28.** Few of the sales representatives turn in (their, its) reports on time.
**2-29.** The board of directors has chosen (their, its) officers.
**2-30.** Gomez and Archer have told (his, their) clients about the new program.
**2-31.** Each manager plans to expand (his, their, his or her) sphere of control next year.
**2-32.** Has everyone supplied (his, their, his or her) Social Security number?
**2-33.** After giving every employee (his, their, a) raise, George told (them, they, all) about the increased workload.
**2-34.** Bob and Tim have opposite ideas about how to achieve company goals. (Who, Whom) do you think will win the debate?
**2-35.** City Securities has just announced (who, whom) it will hire as CEO.
**2-36.** Either of the new products would readily find (their, its) niche in the marketplace.

## Level 2: Workplace Applications

The following items may contain errors in grammar, capitalization, punctuation, abbreviation, number style, word division, and vocabulary. Rewrite each sentence, correcting all errors. If a sentence has no errors, write "Correct" for that number.

**2-37.** Anita Doig from Data Providers will outline their data interpretations as it relates to industry trends, additionally Miss Doig will be asked to comment on how their data should be ulililized.

**2-38.** You're order for 2000 mylar bags has been received by us; please be advised that orders of less than 5000 bags only get a 20 percent discount.

**2-39.** Just between you and I, the new 'customer centric' philosophy seems pretty confusing.

**2-40.** Podcasting can be an effective way to distribute messages to a widespread audience, but you need to pay close attention to the demands of an audio medium.

**2-41.** Among the specialties of Product Marketers International is promotional efforts for clients, including presence on the Internet, radio, and on television.

**2-42.** An overview of a typical marketing plan will be covered in the introduction to this report, to give you an idea of what's in it.

**2-43.** Subsidiary rights sales can be a discreet source of income and compliment your overall sales.

**2-44.** Special events ranging from author breakfasts and luncheons to awards programs and reception's offers a great way to make industry contacts.

**2-45.** We will show you how not only to meet the challenges of information rich material but also the challenges of electronic distance learning.

**2-46.** To site just one problem, the reason that the market is in such a state of confusion is the appalling lack of standards whether for hardware, software or for metadata.

**2-47.** Two leading business consultants Doug Smith and Carla McNeil will share their insights on how specialty stores can effectively compete in a world of Corporate Superstores.

**2-48.** One of the big questions we need to address are "How does buying effect inventory levels"?

**2-49.** The closing of many industry digital entities have greatly affected the perception of e-books as a viable platform.

**2-50.** A competent, motivated, and enthusiastic staff can be a managers' most important asset in a competitive marketplace.

**2-51.** Come by the Technology Lounge where you can log on to computers and plugin laptops and check out demos of sponsor's websites.

### Level 3: Document Critique

The following document may contain errors in grammar, capitalization, punctuation, abbreviation, number style, word division, and vocabulary. As your instructor indicates, photocopy this page and correct all errors using standard proofreading marks (see Appendix C) or download the document and make the corrections in your word processing software.

**Marketing Pro's: Are You're Messages Truthful and Non-Deceptive?!**

In the United States, the FTC (federal Trade Commission) has the authority to impose penalty against advertisers whom violate Federal Standards for truthful advertising. The FTC considers a message to be deceptive, if they include statements that are likely to mislead reasonable customers and the statements are an important part of the purchasing decision. A failures to include important information are also considered deceptive. Also, the FTC also looks at so-called *"implied claims,?"* Claims you don't explicitly make but that can be inferred from what you do or don't say.

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**MyBCommLab**

Go to **mybcommlab.com** for the following Assisted-graded writing questions:

**2-52.** What is the difference between constructive and destructive feedback? [LO-2]

**2-53.** Considering what you've learned about nonverbal communication, what are some of the ways in which communication might break down during an online meeting in which the participants can see video images of only the person presenting at any given time—and then only his or her face? [LO-5]

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PART 2

# The Three-Step Writing Process



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# 3 Planning Business Messages

## LEARNING OBJECTIVES

After studying this chapter, you will be able to

1. Describe the three-step writing process, and explain why it will help you create better messages in less time
2. Explain what it means to analyze the situation when planning a message
3. Describe the techniques for gathering information for simple messages, and identify three attributes of quality information
4. Identify the six basic combinations of media and channels, and highlight the unique challenges of communication on mobile devices
5. Explain why good organization is important to both you and your audience, and explain how to organize any business message



## Communication Matters . . .

"This is the role that stories play—putting knowledge into a framework that is more lifelike, more true to our day-to-day existence."
—Chip Heath and Dan Heath, *Made to Stick: Why Some Ideas Survive and Others Die*

Why do some ideas catch on and others disappear? Why do smart ideas often go unnoticed while mediocre or even bad ideas become permanently stuck in people's consciousness? Brothers Chip and Dan Heath devoted years to solving this puzzle and concluded that audiences are more likely to pay attention to and care about ideas that are simple, concrete, credible, unexpected, and emotional, and they are more likely to act on ideas that are presented in a compelling story.[1] Every business message can be improved by making it simple, concrete, and credible, and many can be improved through the careful use of surprise, emotion, and storytelling.

This chapter is the first of three that explore the three-step writing process, a time-tested method for creating more-effective messages in less time. The techniques you'll learn in this chapter will help you plan and organize messages that will capture and keep your audience's attention.

Amy Surdacki

Stanford University's Chip Heath and Duke University's Dan Heath have identified the key factors that lead audiences to care about and act on the messages they receive.

# Understanding the Three-Step Writing Process

**1 LEARNING OBJECTIVE**
Describe the three-step writing process, and explain why it will help you create better messages in less time.

No matter what kind of information you need to convey, your goal is to craft a message that is *effective* (it meets your audience's needs and gets your points across) and *efficient* (it makes the best use of your time and your audience's time). Following a clear and proven three-step process (see Figure 3.1) will help you meet both goals:

The three-step writing process consists of *planning, writing*, and *completing* your messages.

- **Planning business messages.** To plan any message, first analyze the situation by defining your purpose and developing a profile of your audience. When you're sure about what you need to accomplish with your message, gather information that will meet your audience's needs. Next, select the right combination of media and channels for producing and delivering your message. Then organize the information by defining your main idea, limiting your scope, selecting the direct or indirect approach, and outlining your content. Planning messages is the focus of this chapter.
- **Writing business messages.** After you've planned your message, adapt your approach to your audience with sensitivity, relationship skills, and style. Then you're ready to compose your message by choosing strong words, creating effective sentences, and developing coherent paragraphs. Writing business messages is discussed in Chapter 4.
- **Completing business messages.** After writing your first draft, revise your message to make sure it is clear, concise, and correct. Next produce your message, giving it an attractive, professional appearance. Proofread the final product to ensure high quality and then distribute your message. Completing business messages is discussed in Chapter 5.

**MOBILE APPS**
The note-taking apps Evernote and Notebook help you collect, organize, and retrieve the information for planning writing projects.

As a starting point, allot roughly half your available time for planning, one quarter for writing, and one quarter for completing a message.

Throughout this book, you'll see the three steps in this process applied to a wide variety of business messages. The more you use the process, the easier and faster writing will become for you. You'll also get better at allocating your time for each step. As a general rule, for anything beyond short and simple messages, set aside roughly 50 percent of your available time for planning, 25 percent for writing, and 25 percent for completing. Using half

**1 Plan →**

**Analyze the Situation**
Define your purpose and develop an audience profile.

**Gather Information**
Determine audience needs and obtain the information necessary to satisfy those needs.

**Choose Medium and Channel**
Identify the best combination for the situation, message, and audience.

**Organize the Information**
Define your main idea, limit your scope, select a direct or an indirect approach, and outline your content.

**2 Write →**

**Adapt to Your Audience**
Be sensitive to audience needs by using a "you" attitude, politeness, positive emphasis, and unbiased language. Build a strong relationship with your audience by establishing your credibility and projecting your company's preferred image. Control your style with a conversational tone, plain English, and appropriate voice.

**Compose the Message**
Choose strong words that will help you create effective sentences and coherent paragraphs.

**3 Complete**

**Revise the Message**
Evaluate content and review readability, edit and rewrite for conciseness and clarity.

**Produce the Message**
Use effective design elements and suitable layout for a clean, professional appearance.

**Proofread the Message**
Review for errors in layout, spelling, and mechanics.

**Distribute the Message**
Deliver your message using the chosen medium; make sure all documents and all relevant files are distributed successfully.

**Figure 3.1 The Three-Step Writing Process**
This three-step process will help you create more effective messages in any medium. As you get more practice with the process, it will become easier and more automatic.
*Sources:* Adapted from Kevin J. Harty and John Keenan, *Writing for Business and Industry: Process and Product* (New York: Macmillan Publishing Company, 1987), 3–4; Richard Hatch, *Business Writing* (Chicago: Science Research Associates, 1983), 88–89; Richard Hatch, *Business Communication Theory and Technique* (Chicago: Science Research Associates, 1983), 74–75; Center for Humanities, *Writing as a Process: A Step-by-Step Guide* (Mount Kisco, N.Y.: Center for Humanities, 1987); Michael L. Keene, *Effective Professional Writing* (New York: D. C. Heath, 1987), 28–34.

your time for planning might seem excessive, but careful planning—particularly for lengthy or difficult writing projects—can save you lots of time and trouble in the long run and lead to better results.

# Analyzing the Situation

Every communication effort takes place in a particular situation, meaning you have a specific message to send to a specific audience under a specific set of circumstances. Analyzing the situation gives you the insights necessary to meet your own needs as a communicator while also meeting the information needs of your recipients.

2 LEARNING OBJECTIVE
Explain what it means to analyze the situation when planning a message.

## DEFINING YOUR PURPOSE

A successful message starts with a clear purpose that connects the sender's needs with the audience's needs. All business messages have a **general purpose**: to inform, to persuade, to collaborate, or to initiate a conversation. This purpose helps define the overall approach you'll need to take, from gathering information to organizing your message. Within the scope of that general purpose, each message also has a **specific purpose**, which identifies what you hope to accomplish with your message. The more precisely you can define your specific purpose, the better you'll be able to fine-tune your message to achieve your desired outcome. For example, "get approval to hire three programmers by June 1 in order to meet our November 15 deadline" is more helpful as a planning device than "get approval to hire more staff."

Business messages have both a general purpose and a specific purpose.

After you have defined your specific purpose, make sure it merits the time and effort required for you to prepare and send the message. Ask these four questions:

- **Will anything change as a result of your message?** Make sure you don't contribute to information overload by sending messages that won't change anything. Complaining about things you have no influence over is a good example of a message that probably shouldn't be sent.
- **Is your purpose realistic?** Recognizing whether a goal is realistic is an important part of having good business sense. For example, if you request a raise while the company is struggling, you might send the message that you're not tuned into the situation around you.
- **Is the time right?** People who are busy or distracted when they receive your message are less likely to pay attention to it.
- **Is your purpose acceptable to your organization?** Your company's business objectives and policies, and even laws that apply to your industry, may dictate whether a given purpose is acceptable.

After defining your purpose, verify that the message will be worth the time and effort required to create, send, and receive it.

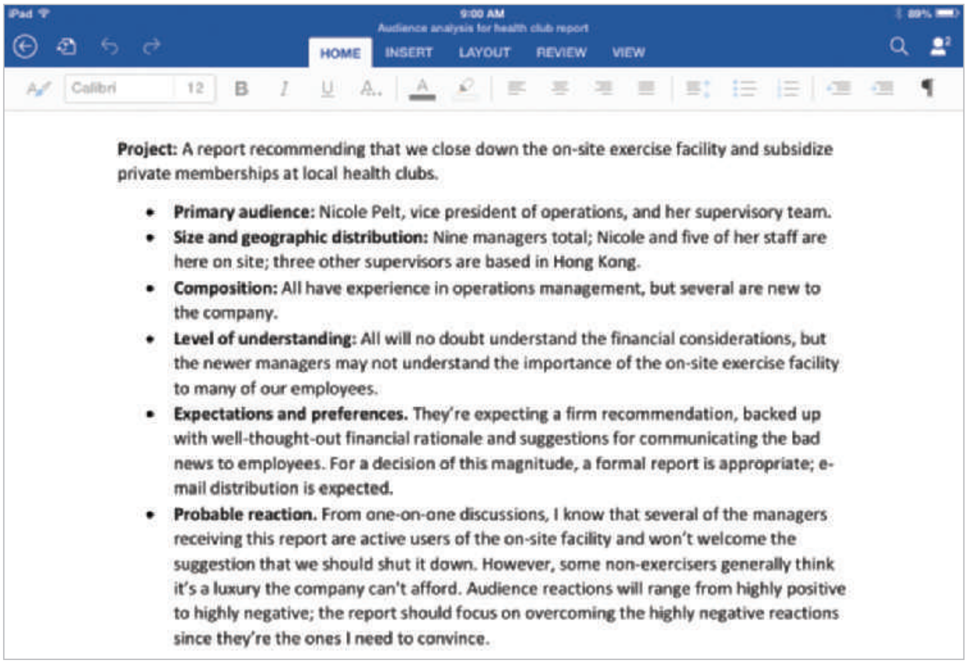
When you are satisfied that you have a clear and meaningful purpose and that now is a smart time to proceed, your next step is to understand the members of your audience and their needs.

## DEVELOPING AN AUDIENCE PROFILE

Before audience members will take the time to read or listen to your messages, they have to be interested in what you're saying. They need to know the message is relevant to their needs—even if they don't necessarily want to read or see your message. The more you know about your audience members, their needs, and their expectations, the more effectively you'll be able to communicate with them. The planning sheet in Figure 3.2 provides an example of the kind of information you need to compile in an audience analysis. Conducting an audience analysis involves the following steps:

- **Identify your primary audience.** For some messages, certain audience members might be more important than others. Don't ignore the needs of less influential members, but make sure you address the concerns of the key decision makers.

Ask yourself some key questions about your audience:
- Who are they?
- How many people do you need to reach?
- How much do they already know about the subject?
- What is their probable reaction to your message?




**Project:** A report recommending that we close down the on-site exercise facility and subsidize private memberships at local health clubs.

- **Primary audience:** Nicole Pelt, vice president of operations, and her supervisory team.
- **Size and geographic distribution:** Nine managers total; Nicole and five of her staff are here on site; three other supervisors are based in Hong Kong.
- **Composition:** All have experience in operations management, but several are new to the company.
- **Level of understanding:** All will no doubt understand the financial considerations, but the newer managers may not understand the importance of the on-site exercise facility to many of our employees.
- **Expectations and preferences.** They're expecting a firm recommendation, backed up with well-thought-out financial rationale and suggestions for communicating the bad news to employees. For a decision of this magnitude, a formal report is appropriate; e-mail distribution is expected.
- **Probable reaction.** From one-on-one discussions, I know that several of the managers receiving this report are active users of the on-site facility and won't welcome the suggestion that we should shut it down. However, some non-exercisers generally think it's a luxury the company can't afford. Audience reactions will range from highly positive to highly negative; the report should focus on overcoming the highly negative reactions since they're the ones I need to convince.

**Figure 3.2 Using Audience Analysis to Plan a Message**
For simple, routine messages, you usually don't need to analyze your audience in depth. However, for complex messages or messages for indifferent or hostile audiences, take the time to study their information needs and potential reactions to your message.
*Source:* Microsoft Word 2013, Microsoft Corporation.

- **Determine audience size and geographic distribution.** A message aimed at 10,000 people spread around the globe will likely require a different approach than one aimed at a dozen people down the hall.
- **Determine audience composition.** Look for similarities and differences in culture, language, age, education, organizational rank and status, attitudes, experience, motivations, biases, beliefs, and any other factors that might affect the success of your message (see Figure 3.3).
- **Gauge audience members' level of understanding.** If audience members share your general background, they'll probably understand your material without difficulty. If not, your message may need an element of education.
- **Understand audience expectations and preferences.** For example, will members of your audience expect complete details or just a summary of the main points? In general, for internal communication, the higher up the organization your message goes, the fewer details people want to see.
- **Forecast probable audience reaction.** As you'll read later in this chapter, the way you organize a message should depend on the reaction you expect to get from your audience. If you expect a favorable response, you can state conclusions and recommendations up front and offer minimal supporting evidence. If you expect skepticism or resistance, you can introduce conclusions gradually and with more proof.

If audience members have different levels of understanding of the topic, aim your message at the most influential decision makers.

A gradual approach and solid evidence are required to win over a skeptical audience.

## Gathering Information

3 LEARNING OBJECTIVE
Describe the techniques for gathering information for simple messages, and identify three attributes of quality information.

When you have a clear picture of your audience, your next step is to assemble the information you will include in your message. For simple messages, you may already have all the information at hand, but for more complex messages, you may need to do considerable research and analysis before you're ready to begin writing. Chapter 10 explores formal techniques for finding, evaluating, and processing information, but you can often use a variety of informal techniques to gather insights and guide your research efforts:

- **Consider the audience's perspective.** Put yourself in the audience's position. What are these people thinking, feeling, or planning? What information do they need in order

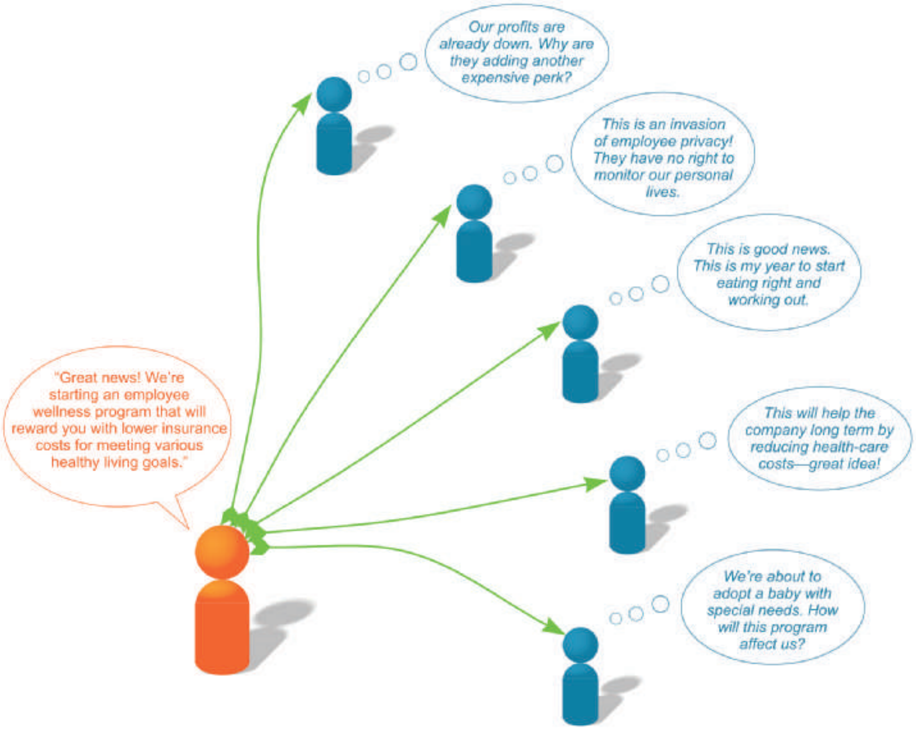



**Figure 3.3 Predicting the Effects of Audience Composition**
As just one example of why it's important to analyze the composition of your audience, the attitudes and beliefs of individual audience members can have a significant impact on the success of a message. In this scenario, for instance, a seemingly positive message about employee benefits can generate a wide range of responses from employees with different beliefs and concerns.

to move forward? If you are initiating a conversation in a social media context, what information will stimulate discussion in your target communities?

- **Listen to the community.** For almost any subject related to business these days, chances are there is a community of customers, product enthusiasts, or other people linked through social media who engage in online discussions. Find them and listen to what they have to say.
- **Read reports and other company documents.** Annual reports, financial statements, news releases, blogs and microblogs by industry experts, marketing reports, and customer surveys are just a few of the many potential sources. Find out whether your company has a *knowledge-management system*, a centralized database that collects the experiences and insights of employees throughout the organization.
- **Talk with supervisors, colleagues, or customers.** Fellow workers and customers may have information you need, or they may have good insights into the needs of your target audience.
- **Ask your audience for input.** If you're unsure what audience members need from your message, ask them if at all possible. Admitting you don't know but want to meet their needs will impress an audience more than guessing and getting it wrong.

If a project doesn't require formal research techniques, or you need answers in a hurry, you can use a variety of informal techniques to gather the information your audience needs.

## UNCOVERING AUDIENCE NEEDS

In many situations, your audience's information needs are readily apparent, such as when a consumer sends an email asking a specific question. In other situations, audience members might be unable to articulate exactly what they want, or you won't have the opportunity to communicate with them before you need to create a message.

In some cases, you may need to do some detective work to find out what information is needed. If you're asked to suggest steps a company can take to improve employee morale,

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Audience members might not be able to describe all the information they need, or you might not have the opportunity to ask them, so you may need to engage in some detective work.

for example, you'll need to investigate the underlying reasons for low morale. By including this information in your report—even though it wasn't specifically requested—you demonstrate to your audience that you've thoroughly investigated the problem.

### PROVIDING REQUIRED INFORMATION

After you have defined your audience's information needs, your next step is to satisfy those needs completely. In addition to delivering the right *quantity* of information, you are responsible for verifying the *quality* of that information. Ask yourself these three questions:

You have a responsibility to make sure the information you provide is accurate, ethical, and pertinent.

- **Is the information accurate?** Inaccuracies can cause a host of problems, from embarrassment and lost productivity to serious safety and legal issues. Be sure to review any mathematical or financial calculations. Check all dates and schedules. Examine your own assumptions and conclusions to be certain they are valid.
- **Is the information ethical?** By working hard to ensure the accuracy of the information you gather, you'll also avoid many ethical problems in your messages. However, messages can also be unethical if important information is omitted or obscured.
- **Is the information pertinent?** Some points will be more important to your audience than others. By focusing on the information that concerns your audience the most, you increase your chances of sending an effective message.

## Selecting the Best Combination of Media and Channels

4 LEARNING OBJECTIVE
Identify the six basic combinations of media and channels, and highlight the unique challenges of communication on mobile devices.

With the necessary information in hand, your next decision involves the best combination of media and channels to reach your target audience. As you recall from Chapter 1, the medium is the *form* a message takes and the channel is the *system* used to deliver the message. The distinction between the two isn't always crystal clear, and some people use the terms differently, but these definitions are a good way to think about the possibilities for business communication.

Most media can be distributed through more than one channel, so whenever you have a choice, think through your options to select the optimum combination. For example, a brief written message could be distributed as a printed letter or memo, or it could be distributed through a variety of digital channels, from email to blogging to social networking.

### THE MOST COMMON MEDIA AND CHANNEL OPTIONS

Media can be divided into *oral*, *written*, and *visual* forms, and all three can be distributed through *digital* and *nondigital* channels.

The simplest way to categorize media choices is to divide them into *oral* (spoken), *written*, and *visual*. Each of these media can be delivered through *digital* and *nondigital channels*, which creates six basic combinations that are discussed in the following sections. Table 3.1 summarizes the general advantages and disadvantages of the six medium/channel combinations. Specific options within these categories have their own strengths and weaknesses to consider as well. (For simplicity's sake, subsequent chapters occasionally use "digital media" to indicate any of the three media types delivered through digital channels.)

#### Oral Medium, In-Person Channel

The nonverbal and interactive aspects of in-person communication are difficult to replicate in most other media/channel combinations.

The oral medium, in-person combo involves talking with people who are in the same location, whether it's a one-on-one conversation over lunch or a more formal speech or presentation. Being in the same physical space is a key distinction because it enables the nuances of nonverbal communication more than any other media/channel combo. As Chapter 2 points out, these nonverbal signals can carry as much weight in the conversation as the words being spoken.

By giving people the ability to see, hear, and react to each other, in-person communication is useful for encouraging people to ask questions, make comments, and work together to reach a consensus or decision. Face-to-face interaction is particularly helpful in complex, emotionally charged situations in which establishing or fostering a business relationship is important.[2] Managers who engage in frequent "walk-arounds," chatting with employees face-to-face, can get input, answer questions, and interpret important business events and trends.[3]

TABLE 3.1 **Medium/Channel Combinations: Advantages and Disadvantages**

| Medium/Channel | Advantages | Disadvantages |
|---|---|---|
| **Oral, in-person** | • Provide opportunity for immediate feedback<br>• Easily resolve misunderstandings and negotiate meanings<br>• Involve rich nonverbal cues (both physical gesture and vocal inflection)<br>• Allow you to express the emotion behind your message | • Restrict participation to those physically present<br>• Unless recorded, provide no permanent, verifiable record of the communication<br>• Reduces communicator's control over the message |
| **Oral, digital** | • Can provide opportunity for immediate feedback (live phone or online conversations)<br>• Not restricted to participants in the same location<br>• Allow time-shifted consumption (e.g., podcasts) | • Lack nonverbal cues other than voice inflections<br>• Can be tedious to listen to if not audience-focused (recorded messages) |
| **Written, printed** | • Allow writers to plan and control their messages<br>• Can reach geographically dispersed audiences<br>• Offer a permanent, verifiable record<br>• Minimize the distortion that can accompany oral messages<br>• Can be used to avoid immediate interactions<br>• Deemphasize any inappropriate emotional components<br>• Give recipients time to process messages before responding (compared to oral communication) | • Offer limited opportunities for timely feedback<br>• Lack the rich nonverbal cues provided by oral media<br>• Often take more time and more resources to create and distribute<br>• Can require special skills in preparation and production if document is elaborate |
| **Written, digital** | • Generally, all the advantages of written printed documents plus:<br>• Fast delivery<br>• Can reach geographically dispersed audiences<br>• Flexibility of multiple formats and channels, from microblogs to wikis<br>• Flexibility to structure messages in creative ways, such as writing a headline on Twitter and linking to the full message on a blog<br>• Ability to link to related and more in-depth information<br>• Can increase accessibility and openness in an organization through broader sharing<br>• Enable audience interaction through social media features. Ease of integrating with other media types, such as embedded videos or photos | • Can be limited in terms of reach and capability (e.g., on Twitter you can reach only those people who follow you or search for you)<br>• Require Internet or mobile phone connectivity<br>• Vulnerable to security and privacy problems<br>• Are easy to overuse (sending too many messages to too many recipients)<br>• Create privacy risks and concerns (exposing confidential data; employer monitoring; accidental forwarding)<br>• Entail security risks (viruses, spyware; network breaches)<br>• Create productivity concerns (frequent interruptions; nonbusiness usage) |
| **Visual, printed** | • Can convey complex ideas and relationships quickly<br>• Often less intimidating than long blocks of text<br>• Can reduce the burden on the audience to figure out how the pieces of a message or concept fit<br>• Can be easy to create in spreadsheets and other software (simple charts and graphs), then integrated with reports | • Can require artistic skills to design<br>• Require some technical skills to create<br>• Can require more time to create than equivalent amount of text<br>• Can be expensive to print |
| **Visual, digital** | • Generally, all the advantages of visual printed documents and all the advantages of written digital formats plus:<br>• Can personalize and enhance the experience for audience members<br>• Offer the persuasive power of multimedia formats, particularly video | • Potential time, cost, and skills needed to create<br>• Can require large amounts of bandwidth |

## Oral Medium, Digital Channel

Oral media via digital channels include any transmission of voice via electronic means, both live and recorded. Examples include telephone calls, podcasts, and voice mail messages. Live phone conversations offer the give-and-take of in-person conversations and can be the best alternative to talking in person. However, without a video component, they can't provide the nuances of nonverbal communication. Podcasts can be a good way to share lectures, commentary, and other spoken content. You can read about podcasting in Chapter 6.

### Written Medium, Print Channel

Written, printed documents are the classic format of business communication. **Memos** are brief printed documents traditionally used for the routine, day-to-day exchange of information within an organization. **Letters** are brief written messages sent to customers and other recipients outside the organization. Reports and proposals are usually longer than memos and letters, although both can be created in memo or letter format. These documents come in a variety of lengths, ranging from a few pages to several hundred, and are usually fairly formal in tone.

While still a useful format, printed documents have been replaced by digital alternatives in many instances. However, here are several situations in which you should consider a printed message over electronic alternatives:

Digital media/channel formats have replaced printed documents in many instances, but print is still the best choice for some messages and situations.

- When you want to make a formal impression
- When you are legally required to provide information in printed form
- When you want to stand out from the flood of electronic messages
- When you need a permanent, unchangeable, or secure record

Obviously, if you can't reach a particular audience electronically, you'll need to use a printed message. Appendix A offers guidelines on formatting printed memos and letters.

### Written Medium, Digital Channel

Most of your business communication efforts will involve the combination of written medium and digital channel.

Most of your business communication efforts will involve written digital messages, with everything from 160-character tweets to website content to book-length reports distributed as portable document format (PDF) files (see Figure 3.4). Business uses of written, digital messages keeps evolving as companies look for ways to communicate more effectively. For example, email has been a primary business medium for the past decade or two, but it is being replaced in many cases by a variety of other digital formats.[4] Chapter 6 takes a closer look at email, IM, blogs, and social networks; Chapter 11 discusses wikis in more detail.

### Visual Medium, Print Channel

Photographs and diagrams can be effective communication tools for conveying emotional content, spatial relationships, technical processes, and other content that can be difficult to describe using words alone. You may occasionally create visual, printed messages as standalone items, but most will be used as supporting material in printed documents.


**Figure 3.4 Media and Channel Choices: Written + Digital**
The online video game magazine *GamesRadar* uses Twitter as a platform for announcing new articles. These tweets are written as *teasers* (see page 176) to entice readers to click through to full articles on the *GamesRadar* website.
*Source:* Screenshot of Games Radar Twitter account, Author: Future US, Inc.

### Visual Medium, Digital Channel

Business messages can really come alive when conveyed by visual media in digital channels. Infographics, interactive diagrams, animation, and digital video have the potential to engage audiences in ways that other formats can't, which is why the use of visual elements in business communication continues to grow.

The combination of the visual medium and a digital channel can be the most compelling and engaging choice for many messages, although it is not always the easiest or cheapest format.

Traditional business messages rely primarily on text, with occasional support from graphics such as charts, graphs, or diagrams to help illustrate points discussed in the text. However, many business communicators are discovering the power of messages in which the visual element is dominant and supported by small amounts of text. For the purposes of this discussion, you can think of visual media as formats in which one or more visual elements play a central role in conveying the message content.

Messages that combine powerful visuals with supporting text can be effective for a number of reasons. Today's audiences are pressed for time and bombarded with messages, so anything that communicates quickly is welcome. Visuals are also effective at describing complex ideas and processes because they can reduce the work required for an audience to identify the parts and relationships that make up the whole. Also, in a multilingual business world, diagrams, symbols, and other images can lower communication barriers by requiring less language processing. Finally, visual images can be easier to remember than purely textual descriptions or explanations.

### The Unique Challenges of Communication on Mobile Devices

Mobile devices can be used to create and consume virtually every digital form of oral, written, and visual media. Thanks to the combination of portability and the flexibility enabled by a wide array of business-focused apps, mobile devices have become a primary tool in business communication. In addition to the factors discussed on pages 55–59 in Chapter 1, consider these issues whenever your messages are likely to be viewed on mobile devices:

The mobile digital channel has become significant in business communication of all types, but it presents some challenges that must be considered.

- **Screen size and resolution.** The screen resolution of phones and tablets has improved considerably in recent years, but the limited size of these screens still presents a challenge simply because many messages are significantly larger than the screens they will be viewed on. The result is a dilemma that pits clarity again context. Readers can zoom in to make text readable and visuals understandable, but particularly on phone screens, the inability to see an entire document page or visual at once can limit a reader's ability to grasp its full meaning. This can be particularly troublesome if you are collaborating on writing or presentation projects and team members need to review documents or slides.
- **Input technologies.** Even for accomplished texters, typing on mobile keyboards can be a challenge. Voice recognition is one way around the keyboard limitation, but anyone using it in public areas or shared offices runs the risk of sharing private message content and annoying anyone within earshot. In addition, even with a stylus, selecting items on a touchscreen can be more difficult than doing so on a PC screen using a mouse. If your website content or other messages and materials require a significant amount of input activity from recipients, try to make it as easy as possible for them. Even simple steps such as increasing the size of buttons and text-entry fields can help.
- **Bandwidth, speed, and connectivity limitations.** The speed and quality of mobile connectivity varies widely by device, carrier, service plan, and geographic location. Even users with higher bandwidth service don't always enjoy the advertised transfer speeds they are paying for. Moreover, mobile users can lose connectivity while traveling, passing through network "dead spots," or during peak-demand hours or events (trade shows and conventions are notorious for this). Don't assume that your mobile recipients will be able to satisfactorily consume the content that you might be creating on a fast, reliable, in-office network.
- **Data usage and operational costs.** As the amount of video traffic in particular increases (video requires much higher bandwidth than text or audio), data consumption is becoming a key concern for mobile carriers and customers alike. Many mobile users do not have unlimited data-usage plans and have to manage their data consumption carefully to avoid excess fees. Some carriers offer unlimited data plans, but even those can come with restrictions such as bandwidth throttling that reduces the speed of a user's connection.[5] Given these factors, be careful about expecting or requiring mobile users to consume a lot of video or other data-intensive content.

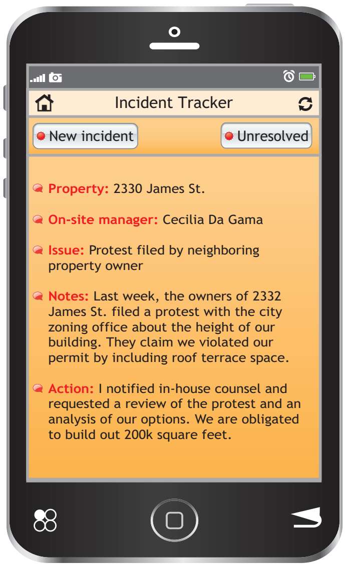
# Business Communicators Innovating with Mobile

As the third major revolution in business communication in the past two decades (after the World Wide Web and social media), mobile communication has the potential to change nearly every aspect of business communication. Here is a small sample of the ways companies are putting mobile to work.

## Training

In the face of changing markets, government regulations, and other forces in the business environment, developing and maintaining employee skill sets is an ongoing challenge for most companies. The challenge is made even more difficult when employees are constantly on the move or geographically dispersed. With training materials developed specifically for mobile devices, companies can deliver training content when and where it helps employees the most.[6]

Eugenio Marongiu/Shutterstock




## Distributed Decision Making

A complementary aspect to managing remote workers via mobile apps is giving employees the authority to make decisions in the field, rather than relying on managers back in the office. In the oil and gas industry, for instance, specialized mobile apps include tools for data visualization, collaboration, and data collection to help on-site employees and supervisors communicate and coordinate their efforts. This capability can be particularly vital after accidents or other crisis events, because it lets employees who are on the scene choose the best course of action without delay.[7]

## Mobile Glossary

In addition to terms defined elsewhere in the book, here are some helpful mobile terms.

### 3G, 4G, and 5G

Successive generations of mobile phone technology, although the generational boundaries are loosely defined and each generation includes a number of competing technologies; roughly speaking, we're in a transition from 3G to 4G now, and 5G (whatever it ends up being) won't arrive for at least several more years.

### Android and iOS

The two major operating systems/platforms for mobile devices. Android devices are made by a wide variety of manufacturers, but iOS devices are made only by Apple.

### Bandwidth

A measure of the data-carrying capacity of a mobile, Wi-Fi, or other network connection; streaming video and other demanding applications require a *broadband* connection, but there's no general agreement on exactly what constitutes broadband.

### Cellular Versus Mobile

Two terms for the same concept; *cellular* (derived from the way phone networks are configured) is used mainly in the United States, whereas *mobile* is used more generally around the world and is also more descriptive, so that's the term used in this book.

## Remote Workforce Management


Ndoeljindoel/Shutterstock

Dispersed workforces also present a variety of supervision and management difficulties. Mobile workforce management apps can solve many of these, from basic functions such as ensuring that workers show up on time at remote job sites to rescheduling customer appointments on the fly to collecting information to share with technical support staff. Sales managers can give just-in-time coaching and encouragement to representatives who are about to call on potential customers. Some systems can even embed information on best practices from experienced workers and deliver virtual coaching to less-experienced workers in the field.[8]

## Recruiting

With a target population that is often on the move, companies are responding by integrating mobile into their recruiting processes. These efforts include mobile-friendly job postings, mobile application and recruiting apps, and interviewing systems that let candidates and recruiters connect using their mobile devices.[9]

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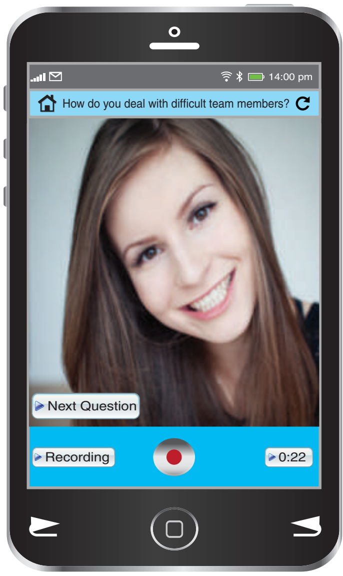
## Project Management

Work teams are often dispersed over wide geographic ranges and frequently on the move, so mobile communication is an essential element of contemporary project management. Instant access to task status and other vital information helps project managers stay on top of rapidly moving projects and helps team members communicate efficiently.



Miroslava Levina/Shutterstock

### Context Awareness
A mobile device's ability to modify its operation based on knowledge of where it is; silencing the ringer when you arrive at your office is a simple example.

### Geofencing
Using the location-sensing capabilities of mobile devices to remotely monitor and control the device and its user; delivery companies, for example, can monitor where their drivers are and make sure they stay within designated areas.

### Over-the-Top (OTT) Application
A digital service that bypasses a traditional distribution network to provide similar capability, often by using cloud capabilities; an example is WhatsApp using Internet connections to create services traditionally provided by mobile phone carriers.[10]

### Phablet
A rather ungainly name for mobile devices that are larger than phones but smaller than tablets.

### Quick Response (QR) Codes and Near-Field Communication (NFC)
Two ways for a mobile device to access additional information; QR codes are square, phone-scannable barcodes that connect the phone to a website; NFC is a short-distance radio technology that enables a data link between a phone and tags that can be attached to products or other locations.

### FACTORS TO CONSIDER WHEN CHOOSING MEDIA AND CHANNELS

You don't always have the option of choosing which medium or channel to use for a particular message. For example, many companies have internal instant messaging (IM) or social networking systems that you are expected to use for certain types of communication, such as project updates. However, when you do have a choice, consider these factors:

Media vary widely in terms of *richness*, which encompasses the number of information cues, feedback mechanisms, and opportunities for personalization.

- **Richness.** *Richness* is a medium's ability to (1) convey a message through more than one informational cue (visual, verbal, vocal), (2) facilitate feedback, and (3) establish personal focus. The richest medium is face-to-face communication; it's personal, it provides immediate feedback (verbal and nonverbal), and it conveys the emotion behind a message.[11] At the other extreme are the leanest media, such as texting and IM—those that communicate in the simplest ways, provide no opportunity for audience feedback, and aren't personalized. In general, use richer media to send nonroutine or complex messages, to humanize your presence throughout the organization, to communicate caring to employees, and to gain employee commitment to company goals. Use leaner media to send routine messages or to transfer information that doesn't require significant explanation.[12]
- **Formality.** Your media choice is a nonverbal signal that affects the style and tone of your message. For example, a printed memo or letter is likely to be perceived as a more formal gesture than an IM or email message.
- **Media and channel limitations.** Every medium and channel has limitations. For instance, IM is perfect for communicating simple, straightforward messages between two people, but it is less effective for complex messages or conversations that involve three or more people.

Many types of media offer instantaneous delivery, but take care not to interrupt people unnecessarily (with IM or phone calls, for example) if you don't need an immediate answer.

- **Urgency.** Some media establish a connection with the audience faster than others, so choose wisely if your message is urgent. However, be sure to respect audience members' time and workloads. If a message isn't urgent and doesn't require immediate feedback, choose a medium such as email or blogging that allows people to respond at their convenience.

Remember that media choices can also send a nonverbal signal regarding costs; make sure your choices are financially appropriate.

- **Cost.** Cost is both a real financial factor and a perceived nonverbal signal. For example, depending on the context, extravagant (and expensive) video or multimedia presentations can send a nonverbal signal of sophistication and professionalism—or careless disregard for company budgets.

When choosing media, don't forget to consider your audience's preferences.

- **Audience preferences.** If you know that your audience prefers a particular media and channel combination, use that format if it works well for the message and the situation. Otherwise you risk annoying the audience or having your message missed or ignored.
- **Security and privacy.** Your company may have restrictions on the media and channels that can be used for certain types of messages, but even if it doesn't, think carefully whenever your messages include sensitive information. Never assume that your email, IM, and other digital communications are private. Many companies monitor these channels, and there is always the risk that networks could get hacked or that messages will be forwarded beyond their original recipients.

## Organizing Your Message

5 LEARNING OBJECTIVE
Explain why good organization is important to both you and your audience, and explain how to organize any business message.

The ability to organize messages effectively is a skill that helps readers and writers alike. Good organization helps your readers in at least three ways:

Good organization benefits your audiences by helping them understand and accept your message in less time.

- **It helps your audience understand your message.** By making your main idea clear and supporting it with logically presented evidence, you help audiences grasp the essential elements of your message.
- **It helps your audience accept your message.** Careful organization also helps you select and arrange your points in a diplomatic way that can soften the blow of unwelcome news or persuade skeptical readers to see your point of view. In contrast, a poorly organized message can trigger negative emotions that prevent people from seeing the value of what you have to say.

- **It saves your audience time.** Good organization saves readers time because they don't have to wade through irrelevant information, seek out other sources to fill in missing information, or struggle to follow your train of thought.

**REAL-TIME UPDATES**
LEARN MORE BY READING THIS INFOGRAPHIC
**Are you living up to your creative potential?**
Surveys indicate many people are in a creative rut. Finding ways to unleash your creativity as a communicator and business professional in general could boost your career. Go to **http://real-timeupdates.com/bce7**. Under "Students," click on "Learn More."

In addition to saving time and energy for your readers, good organization saves *you* time and consumes less of your creative energy. Having a good organizational plan before you start writing helps the words flow because you can focus on *how* you want to say something, rather than struggling with *what* you want to say next. (In fact, whenever you struggle with "writer's block," step back and think about the organization of your message. Chances are what you're really facing is a *thinking* block, not a *writing* block.) A clear plan also helps you avoid composing material you don't need, and it minimizes the time you have to spend revising your first draft.

Good organization helps you by reducing the time and creative energy needed to create effective messages.

Good organizational skills are also good for your career. When you develop a reputation as a clear thinker who cares about your readers and listeners, people will be more inclined to pay attention to what you have to say.

That said, what exactly is good organization? You can think of it as structuring messages in a way that helps recipients get all the information they need while requiring the least amount of time and energy for everyone involved. Good organization starts with a clear definition of your main idea.

To organize any message,
- Define your main idea
- Limit the scope
- Choose the direct or indirect approach
- Outline your information in a logical sequence

## DEFINING YOUR MAIN IDEA

The **topic** of your message is the overall subject, and your **main idea** is a specific statement about that topic. For example, if you believe that the current system of using paper forms for filing employee insurance claims is expensive and slow, you might craft a message in which the topic is employee insurance claims and the main idea is that a new web-based claim-filing system would reduce costs for the company and reduce reimbursement delays for employees.

The topic is the broad subject; the main idea makes a statement about the topic.

In longer documents and presentations, you may need to unify a mass of material with a main idea that encompasses all the individual points you want to make. Sometimes you won't even be sure what your main idea is until you sort through the information. For tough assignments like these, consider a variety of techniques to generate creative ideas:

In some instances, you'll need to do some work up front to determine what the main idea of a message really should be.

- **Brainstorming.** Working alone or with others, generate as many ideas and questions as you can, without stopping to criticize or organize. After you capture all these pieces, look for patterns and connections to help identify the main idea and the groups of supporting ideas.
- **Journalistic approach.** The journalistic approach asks *who, what, when, where, why*, and *how* questions to distill major thoughts from unorganized information.
- **Question-and-answer chain.** Start with a key question the audience is likely to have, and work back toward your message. In most cases, you'll find that each answer generates new questions, until you identify the information that needs to be in your message.
- **Storyteller's tour.** Some writers find it helpful to talk through a communication challenge before trying to write. Record yourself as you describe what you intend to write. Then listen to the playback, identify ways to tighten and clarify the message, and repeat the process until you distill the main idea down to a single, concise message.
- **Mind mapping.** You can generate and organize ideas by using a graphic method called mind mapping. Start with a main idea and then branch out to connect every other related idea that comes to mind. You can find a number of mind-mapping tools online.

**MOBILE APPS**
With Mindjet Maps you can quickly build mind maps to brainstorm a writing project, using text boxes, photos, and more.

## LIMITING YOUR SCOPE

The **scope** of your message is the range of information you present, the overall length, and the level of detail—all of which need to correspond to your main idea. The length of some business messages has a preset limit, whether from a boss's instructions, the technology

Limit the scope of your message so that you can convey your main idea as briefly as possible.

REAL-TIME UPDATES
LEARN MORE BY VIEWING THIS PRESENTATION
**Smart advice for brainstorming sessions**
Generate better ideas in less time with these helpful tips. Go to **http://real-timeupdates.com/bce7**. Under "Students," click on "Learn More."

you're using, or a time frame such as individual speaker slots during a seminar. However, even if you don't have a preset length, limit your scope to the minimum amount of information needed to convey your main idea.

In addition to limiting the overall scope of your message, limit the number of major supporting points to a half dozen or so—and if you can get your idea across with fewer points, all the better. Listing 20 or 30 supporting points might feel as though you're being thorough, but your audience is likely to view such detail as rambling and mind numbing. Instead, group your supporting points under major headings, such as finance, customers, competitors, employees, or whatever is appropriate for your subject. Look for ways to distill your supporting points so that you have a smaller number with greater impact.

The number of words, pages, or minutes you need in order to communicate and support your main idea depends on your topic, your audience members' familiarity with the material and their receptivity to your conclusions, and your credibility. You'll need fewer words to present routine information to a knowledgeable audience that already knows and respects you. You'll need more words to build a consensus about a complex and controversial subject, especially if the members of your audience are skeptical or hostile strangers.

## CHOOSING BETWEEN DIRECT AND INDIRECT APPROACHES

After you've defined your main idea and supporting points, you're ready to decide on the sequence you will use to present your information. You have two basic options:

With the direct approach, you open with the main idea of your message and support it with reasoning, evidence, and examples.

With the indirect approach, you withhold the main idea until you have built up to it logically and persuasively with reasoning, evidence, and examples.

- **Direct approach.** When you know your audience will be receptive to your message, use the **direct approach**: Start with the main idea (such as a recommendation, conclusion, or request) and follow that with your supporting evidence.
- **Indirect approach.** When your audience will be skeptical about or even resistant to your message, you generally want to use the **indirect approach**: Start with the evidence first and build your case before presenting the main idea. Note that taking the indirect approach does not mean avoiding tough issues or talking around in circles. It simply means building up to your main idea in a logical or sensitive way.

To choose between these two alternatives, analyze your audience's likely reaction to your purpose and message, as shown in Figure 3.5. Bear in mind, however, that Figure 3.5 presents only general guidelines; always consider the unique circumstances of each message and audience situation. The type of message also influences the choice of the direct or indirect approach. In the coming chapters, you'll get specific advice on choosing the best approach for a variety of different communication challenges.

## OUTLINING YOUR CONTENT

Outlining takes some time and effort, but it can often save you considerable time and effort in the composing and revising stages.

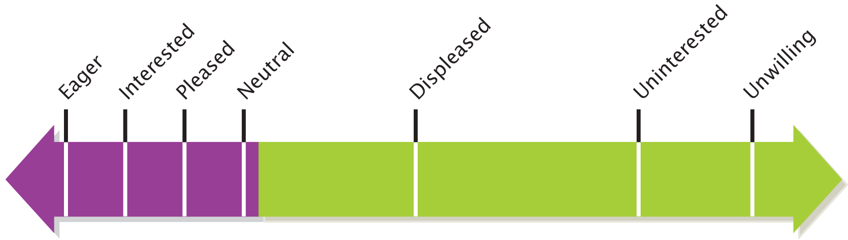
MOBILE APPS
Outliner is one of several apps that make it easy to create and modify writing outlines.

After you have chosen the direct or indirect approach, the next task is to determine the most logical and effective way to present your major points and supporting details. Even if you've resisted creating outlines in your school assignments over the years, get into the habit of creating outlines when you're preparing most business messages. You'll save time, get better results, and do a better job of navigating through complicated situations.

You're no doubt familiar with the basic outline formats that identify each point with a number or letter and that indent certain points to show which ones are of equal status. A good outline divides a topic into at least two parts, restricts each subdivision to one category, and ensures that each subdivision is separate and distinct (see Figure 3.6).

Whichever outlining or organizing scheme you use, start by stating your main idea; you then list your major supporting points and follow with examples and evidence:

- **Start with the main idea.** The main idea helps you establish the goals and general strategy of the message, and it summarizes (1) *what* you want your audience members to do, think, or feel after receiving the message and (2) *why* it makes sense for them




| | Direct Approach | Indirect Approach | |
|---|---|---|---|
| **Audience Reaction** | Eager/interested/ pleased/neutral | Displeased | Uninterested/unwilling |
| **Message Opening** | Start with the main idea, the request, or the good news. | Start with a neutral statement that acts as a transition to the reasons for the bad news. | Start with a statement or question that captures attention. |
| **Message Body** | Provide necessary details. | Give reasons to justify a negative answer. State or imply the bad news, and make a positive suggestion. | Arouse the audience's interest in the subject. Build the audience's desire to comply. |
| **Message Close** | Close with a cordial comment, a reference to the good news, or a statement about the specific action desired. | Close cordially. | Request action. |

**Figure 3.5 Choosing Between the Direct and Indirect Approaches**
Think about the way your audience is likely to respond before choosing your approach.

to do so. Everything in your message should either support the main idea or explain its implications. (Remember that if you choose the indirect approach, the main idea will appear toward the end of your message, after you've presented your major supporting points.)

- **State the major points.** Support your main idea with the major points that clarify and explain your ideas in more concrete terms. If your purpose is to inform and the material is factual, your major points may be based on something physical or financial—for example, something you can visualize or measure, such as activities to be performed, functional units, spatial or chronological relationships, or parts of a whole. When you're describing a process, the major points are usually steps in the process. When

I. First major point
  A. First subpoint
  B. Second subpoint
    1. Examples and evidence
    2. Examples and evidence
      a. Detail
      b. Detail
    3. Examples and evidence
  C. Third subpoint
II. Second major point
  A. First subpoint
    1. Examples and evidence
    2. Examples and evidence
  B. Second subpoint

The particular message is divided into two major points (I and II).

Subpoint B is supported with three sets of examples and evidence (1,2, and 3), the second of which is further subdivided with two detail sections.

The first major point is divided into three subpoints (A, B, and C).

MyBCommLab Apply Figure 3.6's key concepts by going to **mybcommlab.com**

**Figure 3.6 Structuring an Outline**
No matter what outlining format you use, think through your major supporting points and the examples and evidence that can support each point.

you're describing an object, the major points often correspond to the parts of the object. When you're giving a historical account, major points represent events in the chronological chain of events. If your purpose is to persuade or to collaborate, select major points that develop a line of reasoning or a logical argument that proves your central message and motivates your audience to act.

- **Provide examples and evidence.** After you've defined the main idea and identified major supporting points, you're ready to back up those points with examples and evidence that help audience members understand, accept, and remember your message. Choose your examples and evidence carefully. You want to be compelling and complete but also as concise as possible. One strong example or piece of evidence can be more effective than three or four weaker items.

Choose supporting points, evidence, and examples carefully; a few strong points will make your case better than a large collection of weaker points.

Figure 3.7 illustrates several of the key themes about organizing a message: helping readers get the information they need quickly, defining and conveying the main idea, limiting the scope of the message, choosing the approach, and outlining your information.

## BUILDING READER INTEREST WITH STORYTELLING TECHNIQUES

Storytelling might seem like an odd subject for a business course, but stories can be an effective way to organize messages in a surprising number of business communication scenarios, from recruiting and training employees to enticing investors and customers. Storytelling is such a vital means of communicating that, in the words of management consultant Steve Tobak, "It's hard to imagine your career going anywhere if you can't tell a story."[13] Fortunately, you've been telling stories all your life, so narrative techniques already come naturally to you; now it's just a matter of adapting those techniques to business situations.

You've already been on the receiving end of thousands of business stories. Storytelling is one of the most common structures used in television commercials and other advertisements. People love to share stories about themselves and others, too, which makes social media ideal for storytelling.[14]

Career-related stories, such as how someone sought and found the opportunity to work on projects he or she is passionate about, can entice skilled employees to consider joining a firm. Established companies often tell the stories of their early days to highlight their depth of experience or core values (see Figure 3.8 on page 120). Entrepreneurs use stories to help investors see how their new ideas have the potential to affect people's lives (and therefore generate lots of sales). Stories can be cautionary tales as well, dramatizing the consequences of career blunders, ethical mistakes, and strategic missteps.

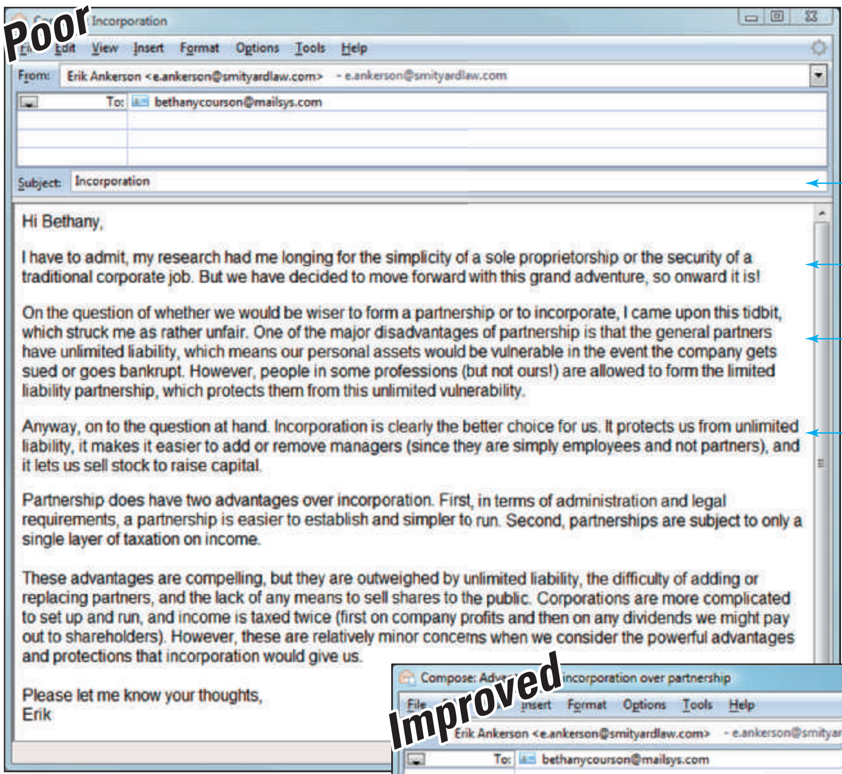
Storytelling is an effective way to organize many business messages because it helps readers personalize the message and understand causes and consequences.

A key reason storytelling can be so effective is that stories help readers and listeners imagine themselves living through the experience of the person in the story. As a result, people tend to remember and respond to the message in ways that can be difficult to achieve with other forms of communication.

In addition, stories can demonstrate cause-and-effect relationships in a compelling fashion.[15] Imagine attending an employee orientation and listening to the trainer read off a list of ethics rules and guidelines. Now imagine the trainer telling the real-life story of an ambitious new employee who bent the rules and wound up paying dearly. As an ambitious new employee yourself, that story is likely to stick in your mind a lot more permanently than a list of rules. This ability to share organizational values is one of the major benefits of using storytelling in business communication, particularly across diverse workforces.[16]

Organize stories in three parts: a beginning that introduces a sympathetic person with a dream or a challenge, a middle that shows the obstacles to be overcome, and an ending that resolves the situation and shows the moral or message of the story.

A classic story has three basic parts. The beginning of the story presents someone whom the audience can identify with in some way, and this person has a dream to pursue or a problem to solve. (Think of how movies and novels often start by introducing a likable character who immediately gets into danger, for example.) The middle of the story shows this character taking action and making decisions as he or she pursues the goal or tries to solve the problem. The storyteller's objective here is to build the audience's interest by increasing the tension: Will the "hero" overcome the obstacles and defeat whatever



Poor

Incorporation

File Edit View Insert Format Options Tools Help

From: Erik Ankerson <e.ankerson@smityardlaw.com> - e.ankerson@smityardlaw.com

To: bethanycourson@mailsys.com

Subject: Incorporation

Hi Bethany,

I have to admit, my research had me longing for the simplicity of a sole proprietorship or the security of a traditional corporate job. But we have decided to move forward with this grand adventure, so onward it is!

On the question of whether we would be wiser to form a partnership or to incorporate, I came upon this tidbit, which struck me as rather unfair. One of the major disadvantages of partnership is that the general partners have unlimited liability, which means our personal assets would be vulnerable in the event the company gets sued or goes bankrupt. However, people in some professions (but not ours!) are allowed to form the limited liability partnership, which protects them from this unlimited vulnerability.

Anyway, on to the question at hand. Incorporation is clearly the better choice for us. It protects us from unlimited liability, it makes it easier to add or remove managers (since they are simply employees and not partners), and it lets us sell stock to raise capital.

Partnership does have two advantages over incorporation. First, in terms of administration and legal requirements, a partnership is easier to establish and simpler to run. Second, partnerships are subject to only a single layer of taxation on income.

These advantages are compelling, but they are outweighed by unlimited liability, the difficulty of adding or replacing partners, and the lack of any means to sell shares to the public. Corporations are more complicated to set up and run, and income is taxed twice (first on company profits and then on any dividends we might pay out to shareholders). However, these are relatively minor concerns when we consider the powerful advantages and protections that incorporation would give us.

Please let me know your thoughts,
Erik

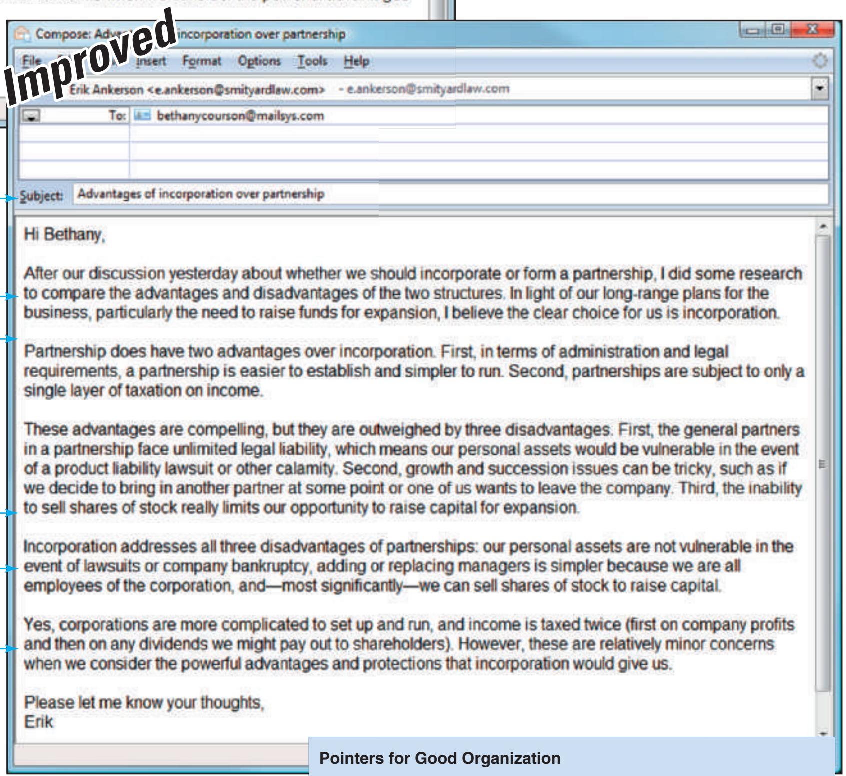
This vague subject line offers few clues about the topic of the message.

The email starts off with an irrelevant discussion, doesn't explain what research this refers to, and fails to introduce the topic of the message.

This paragraph introduces the topic but then shifts to an irrelevant discussion (it makes a good point about unlimited liability, but the point is buried in irrelevant material).

The main idea, that the pair should incorporate, is buried in the middle of the message.

By jumping from partnership to incorporation, back to partnership, and then back to incorporation again throughout the course of the message, the writer forces the reader to piece together the comparative evidence herself.



Improved

Compose: Advantages of incorporation over partnership

File Edit View Insert Format Options Tools Help

From: Erik Ankerson <e.ankerson@smityardlaw.com> - e.ankerson@smityardlaw.com

To: bethanycourson@mailsys.com

Subject: Advantages of incorporation over partnership

Hi Bethany,

After our discussion yesterday about whether we should incorporate or form a partnership, I did some research to compare the advantages and disadvantages of the two structures. In light of our long-range plans for the business, particularly the need to raise funds for expansion, I believe the clear choice for us is incorporation.

Partnership does have two advantages over incorporation. First, in terms of administration and legal requirements, a partnership is easier to establish and simpler to run. Second, partnerships are subject to only a single layer of taxation on income.

These advantages are compelling, but they are outweighed by three disadvantages. First, the general partners in a partnership face unlimited legal liability, which means our personal assets would be vulnerable in the event of a product liability lawsuit or other calamity. Second, growth and succession issues can be tricky, such as if we decide to bring in another partner at some point or one of us wants to leave the company. Third, the inability to sell shares of stock really limits our opportunity to raise capital for expansion.

Incorporation addresses all three disadvantages of partnerships: our personal assets are not vulnerable in the event of lawsuits or company bankruptcy, adding or replacing managers is simpler because we are all employees of the corporation, and—most significantly—we can sell shares of stock to raise capital.

Yes, corporations are more complicated to set up and run, and income is taxed twice (first on company profits and then on any dividends we might pay out to shareholders). However, these are relatively minor concerns when we consider the powerful advantages and protections that incorporation would give us.

Please let me know your thoughts,
Erik

The subject line states the topic (incorporation vs. partnership) and the main idea (incorporation is the better choice).

The opening provides a context by referring to a previous conversation and then states the main idea.

These two paragraphs support the main idea by showing how the disadvantages of partnerships outweigh the advantages.

The writer continues to provide support by explaining how incorporation overcomes all three key disadvantages of partnerships.

The comparison is completed by identifying two disadvantages of incorporation but noting that they are outweighed by the advantages.

**Pointers for Good Organization**

- Get to the topic of the message quickly; don't make the reader guess what the message is about.
- Start with the main idea and then support it (direct approach) or build up to the main idea at the end (indirect approach).
- Group related ideas and present them in a logical order.
- Include only the information needed to convey and support your main idea.

MyBCommLab Apply Figure 3.7's key concepts by going to **mybcommlab.com**

**Figure 3.7 Improving the Organization of a Message**

This writer is following up on a conversation from the previous day, in which he and the recipient discussed which of two forms of ownership, a partnership or a corporation, they should use for their new company. (*Partnership* has a specific legal meaning in this context.) That question is the topic of the message; the main idea is the recommendation that they incorporate, rather than form a partnership. Notice how the Improved version uses the direct approach to quickly get to the main idea and then supports that by comparing the advantages and disadvantages of both forms of ownership. In contrast, the Poor version contains irrelevant information, makes the comparison difficult to follow, and buries the main idea in the middle of the message.

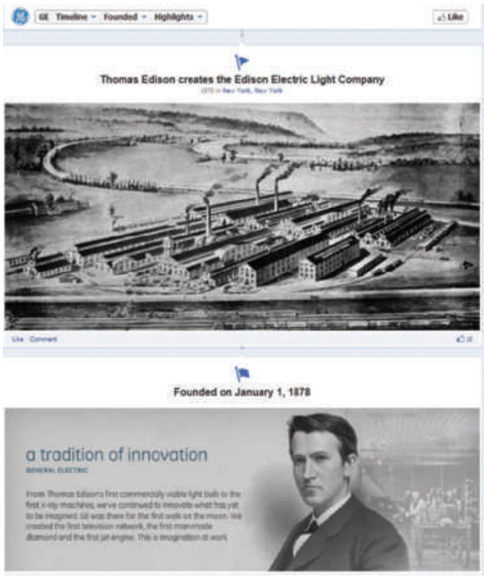



**Figure 3.8 Storytelling as a Way to Organize Messages**
Many companies now use Facebook's timeline feature to create visual stories of their founding and early years.
*Source:* Copyright © 2012 by General Electric, Inc.

adversary is keeping him or her from away from the goal?[17] The end of the story answers that question and usually offers a lesson to be learned about the outcome as well.

By the way, even though these are "stories," they must not be made-up tales. Telling stories that didn't happen to people who don't exist while presenting them as real-life events is a serious breach of ethics that damages a company's credibility.[18]

Consider adding an element of storytelling whenever your main idea involves the opportunity to inspire, persuade, teach, or warn readers or listeners about the potential outcomes of a particular course of action.

For fresh ideas and media materials on planning messages, visit http://real-timeupdates.com/bce7 and click on Chapter 3.

# Chapter Review and Activities

## Learning Objectives: Check Your Progress

**Objective 1: Describe the three-step writing process, and explain why it will help you create better messages in less time.**

The three-step writing process is built around planning, writing, and completing business messages. Planning involves analyzing the situation, gathering the information you will need to meet audience needs, selecting the right medium or combination of media, and organizing your information. The writing step involves adapting to your audience and composing your message. Completing involves the four tasks of revising, proofreading, producing, and distributing the message. The three-step process helps you create more effective messages because it keeps you focused on what your audience needs to get from a message, and it saves you time by reducing the amount of reworking that can happen when someone starts writing without clear goals or organization in mind.

**Objective 2: Explain what it means to analyze the situation when planning a message.**

Analyzing the situation gives you the insights necessary to meet your own needs as a communicator while also meeting the information needs of your recipients. You can accomplish this goal by looking at the communication process from both ends, by defining your purpose in sending the message, and by creating a profile of your target audience. The general purpose of a message identifies your overall intent—to inform, to persuade, to collaborate, or to initiate a conversation. The specific purpose identifies what you hope to accomplish with the message. Without a clear purpose in mind, you are likely to spend more time and energy than you really need to, and chances are you won't create an effective message.

Understanding your audience is a vital aspect of planning because the more you know about your audience members, their needs, and their expectations, the more effectively you'll be able to communicate with them. To create an audience profile, identify the primary audience, its size and geographic distribution, its composition (language, education, experience, and other factors that could affect message reception), and its level of understanding, expectations and preferences, and probable reaction to your message.

**Objective 3: Describe the techniques for gathering information for simple messages, and identify three attributes of quality information.**

Simple messages usually don't require extensive information gathering, but to acquire useful insights, consider the audience's perspective; find and listen to online communities; read reports and other company documents; talk with supervisors, colleagues, or customers; and ask your audience for input, if possible. Judge the quality of any information you include by making sure it is accurate, ethical, and pertinent.

**Objective 4: Identify the six basic combinations of media and channels, and highlight the unique challenges of communication on mobile devices.**

Media can be divided into oral (spoken), written, and visual, and these three formats can be delivered through digital and nondigital channels.

**Objective 5: Explain why good organization is important to both you and your audience, and explain how to organize any business message.**

Good organization helps your audience understand and accept your message with less time and effort. It also saves you time when preparing messages. With a clear path to follow when writing, you'll produce messages faster and spend far less time revising. To organize any message, define your main idea, limit the scope for maximum impact, choose the direct or indirect approach to match the situation, and outline your information in a logical sequence.

MyBCommLab

Go to **mybcommlab.com** to complete the problems marked with this icon.

## Test Your Knowledge

To review chapter content related to each question, refer to the indicated Learning Objective.

**3-1.** What are the three major steps in the writing process? [LO-1]

**3-2.** What do you need to know to develop an audience profile? [LO-2]

**3-3.** How would you informally gather information to be included in your message? [LO-3]

**3-4.** How does the choice of channel impact the three messaging media? [LO-4]

**3-5.** What are the techniques you would employ to generate ideas for your topic? [LO-5]

## Apply Your Knowledge

To review chapter content related to each question, refer to the indicated Learning Objective.

**3-6.** As the chief executive of a leading magazine, what are the four levels of introspection that you would expect from your editorial team members in planning their messages? [LO-2]

**3-7.** Your advertising department has posted an advertisement of financial results that contains some inaccuracies. As the public relations manager responsible for the subsequent press release, what are the areas that you would be cautious about now in gathering quality information? What are the sources you would tap in your organization to derive this information, and how would you rectify the error on the part of your advertising team through your press release? [LO-3]

**3-8.** You are organizing an exploratory in-person meeting with engineering representatives from a dozen manufacturers around the world to discuss updates to a technical standard that all the companies' products must adhere to. The representatives have a wide range of firmly held opinions on the subject, because the changes could help some companies and hurt others. They can't even agree on what should be addressed in the first meeting, so you need to develop a minimum level of consensus on what should be on the agenda. Which combination of media and channels would you use to move the conversation forward and finalize the agenda? Each company has one representative, and any discussions need to be kept confidential. [LO-4]

**3-9.** You have been invited to speak at an annual industry conference. After preparing the outline for your presentation, you see that you've identified 14 separate points to support your main idea. Should you move ahead with creating the slides for your presentation or move back and rethink your outline? Why? [LO-5]

## Practice Your Skills

### Exercises for Perfecting Your Writing

To review chapter content related to each set of exercises, refer to the indicated Learning Objective.

**Specific Purpose:** For each of the following communication tasks, state a specific purpose (if you have trouble, try beginning with "I want to . . ."). [LO-2]

**3-10.** A report to your boss, the store manager, about the outdated items in the warehouse

**3-11.** A blog posting to customers and the news media about your company's plans to acquire a competitor

**3-12.** A letter to your debt-ridden client on the outstanding dues owed to your company

**3-13.** A phone call to a supplier to check on an overdue parts shipment

**3-14.** A podcast to new users of the company's online content management system

**Audience Profile:** For each communication task below, write brief answers to three questions: (1) Who is my audience? (2) What is my audience's general attitude toward my subject? (3) What does my audience need to know? [LO-2]

**3-15.** A final-notice collection letter from an appliance manufacturer to an appliance dealer, sent 10 days before initiation of legal collection procedures

**3-16.** An advertisement for peanut butter

**3-17.** A press release to business publications about the sudden management changes in your company and the appointment of a new CEO from one of your competitors

**3-18.** A cover letter sent along with your résumé to a potential employer

**3-19.** A request (to the seller) for a price adjustment on a piano that incurred $150 in damage during delivery to a banquet room in the hotel you manage

**Media and Purpose:** List three messages you have read, viewed, or listened to lately (such as direct-mail promotions, letters, email or instant messages, phone solicitations, blog posts, social network pages, podcasts, or lectures). For each message, determine the general and the specific purpose, then answer the questions listed. [LO-2] [LO-4]

**Message #1:**

**3-20.** General purpose

**3-21.** Specific purpose

**3-22.** Was the message well timed?

**3-23.** Did the sender choose an appropriate medium and channel for the message?

**3-24.** Was the sender's purpose realistic?

**Message #2:**

**3-25.** General purpose

**3-26.** Specific purpose

**3-27.** Was the message well timed?

**3-28.** Did the sender choose an appropriate medium and channel for the message?

**3-29.** Was the sender's purpose realistic?

**Message #3:**

**3-30.** General purpose

**3-31.** Specific purpose

**3-32.** Was the message well timed?
**3-33.** Did the sender choose an appropriate medium and channel for the message?
**3-34.** Was the sender's purpose realistic?

**Message Organization: Choosing the Approach:** Indicate whether the direct or the indirect approach would be best in each of the following situations. [LO-5]

**3-35.** An email message to a car dealer, asking about the availability of a specific make and model of car
**3-36.** A letter from a recent college graduate, requesting a letter of recommendation from a former instructor
**3-37.** A letter turning down a job applicant
**3-38.** An email reassuring team members that the shift to the new office and change in timings will not affect their work–life balance
**3-39.** A final request to settle a delinquent debt

**Message Organization: Drafting Persuasive Messages:** If you were trying to persuade people to take the following actions, would you choose the direct or indirect approach? [LO-5]

**3-40.** You want your boss to approve your plan for hiring two new people.
**3-41.** You want to be hired for a job.
**3-42.** You want to be granted a business loan.
**3-43.** You want to collect a small amount from a regular customer whose account is slightly past due.
**3-44.** You want to collect a large amount from a customer whose account is seriously past due.

### Activities

Each activity is labeled according to the primary skill or skills you will need to use. To review relevant chapter content, you can refer to the indicated Learning Objective. In some instances, supporting information will be found in another chapter, as indicated.

**3-45. Analyzing the Situation; Media Skills: Presentations [LO-2]** Visit the PepsiCo website and locate the latest annual report. Read the annual report's letter to shareholders. Who is the audience for this message? What is the general purpose of the message? What do you think this audience wants to know from the chairman of PepsiCo? Summarize your answers in a one-page report or five-slide presentation, as your instructor directs.

**3-46. Planning: Creating an Audience Profile; Collaboration: Team Projects [LO-2], [LO-3], Chapter 2** Your website design start-up has been commissioned to create a distinct profile page for a client. You have mandated your team to visit the profile pages of three client competitors. Analyze the style and content of each profile page. What are the techniques these competitors might have adopted in collating their information? How else would you go about collecting information for your client's profile page? Prepare a presentation showcasing the information these competitors display on their home pages.

**3-47. Planning: Assessing Audience Needs; Media Skills [LO-4], Chapter 1** Using a laptop or desktop computer, visit the website of any well-known company and review its About or About Us page. Identify three ways you would modify this page to meet the needs of readers accessing it with smartphones.

**3-48. Planning: Analyzing the Situation, Selecting Media; Media Skills: Email [LO-4]** Your crisis communications firm has been hired to project the right the image of a pharmaceutical company. In recent days, the company has received threatening emails and disturbing phone calls from two social activists about alleged contamination in its insulin vials. They threaten to take their story to the media. How would you analyze this situation? Which media and channels do you think are best suited for your strategy and why? If this crisis had already been reported in social media, how would you have handled this case differently? Post an email to your client on the strategy you plan to adopt, your selection of channels and media, and the rationale behind each.

**3-49. Planning: Limiting Your Scope [LO-5]** Suppose you are preparing to recommend that top management install a new heating system that uses the *cogeneration* process. The following information is in your files. Eliminate topics that aren't essential and then arrange the other topics so that your report will give top managers a clear understanding of the heating system and a balanced, concise justification for installing it. Submit a clear and concise outline to your instructor.

- History of the development of the cogeneration heating process
- Scientific credentials of the developers of the process
- Risks assumed in using this process
- Your plan for installing the equipment in the headquarters building
- Stories about the successful use of cogeneration technology in comparable facilities
- Specifications of the equipment that would be installed
- Plans for disposing of the old heating equipment
- Costs of installing and running the new equipment
- Advantages and disadvantages of using the new process
- Detailed 10-year cost projections
- Estimates of the time needed to phase in the new system
- Alternative systems that management might want to consider

**3-50. Planning: Using Storytelling Techniques; Communication Ethics: Providing Ethical Leadership: Media Skills: Podcasting [LO-5], Chapter 1** Research recent episodes of ethical lapses by a business professional or executive in any industry. Choose one example that has a clear story "arc" from beginning to end. Outline a cautionary tale that explains the context of the ethical lapse, the choice the person made, and the consequences of the ethical lapse. Script a podcast (aim for roughly 3 to 5 minutes) that tells the story. If your instructor directs, record your podcast and post to your class blog.

## Expand Your Skills

### Critique the Professionals

Locate an example of professional communication in any medium-channel combo that you think would work equally well—or perhaps better—in another combination. Using the media and channel selection guidelines in this chapter and your understanding of the communication process, write a brief analysis (no more than one page) of the company's choice and explain why your choice would be at least as effective. Be sure to cite specific elements from the piece and support from the chapter.

### Sharpen Your Career Skills Online

Bovée and Thill's Business Communication Web Search, at **http://websearch.businesscommunicationnetwork.com**, is a unique research tool designed specifically for business communication research. Use the Web Search function to find a website, video, PDF document, podcast, or presentation that offers advice on analyzing audiences, selecting media, outlining, storytelling (in a business context), or any aspect of the writing process (including models other than the three-step process covered in this text). Write a brief email message to your instructor or a post for your class blog, describing the item that you found and summarizing the career skills information you learned from it.

## Improve Your Grammar, Mechanics, and Usage

You can download the text of this assignment from **http://real-timeupdates.com/bce7**; click on Student Assignments and then click on Chapter 3. Improve Your Grammar, Mechanics, and Usage.

### Level 1: Self-Assessment—Verbs

Review Section 1.3 in the Handbook of Grammar, Mechanics, and Usage.

For these items, indicate the verb form called for in each sentence.

**3-51.** I (present perfect, become) the resident expert on repairing the copy machine.
**3-52.** She (past, know) how to conduct an audit when she came to work for us.
**3-53.** Since Joan was promoted, she (past perfect, move) all the files to her office.
**3-54.** Next week, call John to tell him what you (future, do) to help him set up the seminar.
**3-55.** By the time you finish the analysis, he (future perfect, return) from his vacation.

For these items, rewrite the sentences so that they use active voice instead of passive.

**3-56.** The report will be written by Leslie Cartwright.
**3-57.** The failure to record the transaction was mine.
**3-58.** Have you been notified by the claims department of your rights?
**3-59.** We are dependent on their services for our operation.
**3-60.** The damaged equipment was returned by the customer before we even located a repair facility.

In these items, indicate the correct verb form provided in parentheses.

**3-61.** Everyone upstairs (receive, receives) mail before we do.
**3-62.** Neither the main office nor the branches (is, are) blameless.
**3-63.** C&B Sales (is, are) listed in the directory.
**3-64.** When measuring shelves, 7 inches (is, are) significant.
**3-65.** About 90 percent of the employees (plan, plans) to come to the company picnic.

### Level 2: Workplace Applications

The following items may contain errors in grammar, capitalization, punctuation, abbreviation, number style, word division, and vocabulary. Rewrite each sentence, correcting all errors. If a sentence has no errors, write "Correct" for that number.

**3-66.** Cut two inches off trunk and place in a water stand, and fill with water.
**3-67.** The newly-elected officers of the Board are: John Rogers, president, Robin Doig, vice-president, and Mary Sturhann, secretary.
**3-68.** Employees were stunned when they are notified that the trainee got promoted to Manager only after her 4th week with the company.
**3-69.** Seeking reliable data on U.S. publishers, Literary Marketplace is by far the best source.
**3-70.** Who did you wish to speak to?
**3-71.** The keynote address will be delivered by Seth Goodwin, who is the author of six popular books on marketing, has written two novels, and writes a column for "Fortune" magazine.
**3-72.** Often the reputation of an entire company depend on one employee that officially represents that company to the public.
**3-73.** The executive director, along with his staff, are working quickly to determine who should receive the Award.
**3-74.** Him and his co-workers, the top bowling team in the tournament, will represent our Company in the league finals on saturday.
**3-75.** Listening on the extension, details of the embezzlement plot were overheard by the Security Chief.
**3-76.** The acceptance of visa cards are in response to our customer's demand for a more efficient and convenient way of paying for parking here at San Diego International airport.
**3-77.** The human resources dept. interviewed dozens of people, they are seeking the better candidate for the opening.
**3-78.** Libraries' can be a challenging; yet lucrative market if you learn how to work the "system" to gain maximum visibility for you're products and services.
**3-79.** Either a supermarket or a discount art gallery are scheduled to open in the Mall.
**3-80.** I have told my supervisor that whomever shares my office with me cannot wear perfume, use spray deodorant, or other scented products.

### Level 3: Document Critique

The following document may contain errors in grammar, capitalization, punctuation, abbreviation, number style, word division, and vocabulary. As your instructor indicates, photocopy this page and correct all errors using standard proofreading marks (see Appendix C) or download the document and make the corrections in your word-processing software.

Memo

TO: Store mngrs.
FROM: Tom Dooley, vice pres. real estate, from Stereo City headquarters, Renaissance Tower 1201 Elm street; Dallas TX 75270
DATE: May 8 2015
SUB: Recent Cash Flow and consumer response—Survey

Now that our stores have been re-organized with your hard work and cooperation, we hope revenues will rise to new heights; if we reemphasize equipment sales as Stereo City core business and reduce the visibility of our sideline retail products. Just in case though, we want to be certain that these changes are having the postive affect on our cash flow that we all except and look forward to.

To help us make that determination, respond to the following survey questions and fax them back. Answer concisely; but use extra paper if necessary—for details and explanations.

When you finish the survey it will help headquarters improve service to you; but also, help us all improve service to our customers. Return your survey before May 15 to my attention. Then Stereo city hopefully can thrive in a marketplace, that critics say we cannot conquer. Stereo City must choose wisely and serve it's customers well in a difficult retail business environment.

Times are very tough but if we work hard at it its possible we might make Stereo City's 'the man on the streets' favorite 'place to go to purchase audio equipment!

## MyBCommLab

Go to **mybcommlab.com** for the following Assisted-graded writing questions:

**3-81.** As a member of your firm's public relations department, which medium-channel combination(s) would you recommend using to inform the local community that your toxic-waste cleanup program has been successful? Justify your recommendation. [LO-4]

**3-82.** Would you use the direct or indirect approach to ask employees to work overtime to meet an important deadline? Please explain. [LO-5]

## Endnotes

**1.** Chip Heath and Dan Heath, *Made to Stick: Why Some Ideas Survive and Others Die* (New York: Random House, 2008), 214.
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**3.** Linda Duyle, "Get Out of Your Office," *HR Magazine*, July 2006, 99–101.
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**5.** Roger Cheng, "Verizon CEO: Unlimited Data Plans Just Aren't Sustainable," CNET, 24 September 2013, http://news.cnet.com; Brian Bennet, "Sprint Officially Outs New Unlimited Plans," CNET, 11 July 2013, http://reviews.cnet.com; footnotes on Sprint website, accessed 2 March 2014, http://shop.sprint.com.
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**13.** Steve Tobak, "How to Be a Great Storyteller and Win Over Any Audience," BNET, 12 January 2011, www.bnet.com.
**14.** Debra Askanase, "10 Trends in Sustainable Social Media," Community Organizer 2.0 blog, 13 May 2010, www.communityorganizer20.com.
**15.** Heath and Heath, *Made to Stick*, 206.
**16.** Randolph T. Barker and Kim Gower, "Strategic Application of Storytelling in Organizations," *Journal of Business Communication* 47, no. 3 (July 2010): 295–312.
**17.** David Meerman Scott, "Effective Storytelling for Business," WebInkNow blog, 18 February 2013, www.webinknow.com.
**18.** Jennifer Aaker and Andy Smith, "7 Deadly Sins of Business Storytelling," American Express Open Forum, accessed 21 March 2011, www.openforum.com.

# 4 Writing Business Messages

## LEARNING OBJECTIVES

After studying this chapter, you will be able to

1. Identify the four aspects of being sensitive to audience needs when writing business messages
2. Explain how establishing your credibility and projecting your company's image are vital aspects of building strong relationships with your audience
3. Explain how to achieve a tone that is conversational but businesslike, explain the value of using plain language, and define active and passive voice
4. Describe how to select words that are not only correct but also effective
5. Define the four types of sentences, and explain how sentence style affects emphasis within a message
6. Define the three key elements of a paragraph, and list five ways to develop coherent paragraphs
7. List five techniques for writing effective messages for mobile readers



## Communication Matters . . .

"From now on, write all your email messages as though you're writing for a mobile reader and save all your readers time and effort."[1]
—Verne Ordman, business writing skills trainer,
Verne Ordman and Associates

As an experienced business trainer with an advanced degree in industrial psychology, Verne Ordman has a keen sense of how people process information. Her advice regarding email messages not only suggests how pervasive mobile devices have become in business today but also highlights the importance of keeping readers' needs in mind for every message you create. This chapter addresses the writing phase of the three-step writing process, with practical advice for adapting to your audiences and composing messages that get results.

Hero Images/Getty Images

The techniques that promote easy reading on small mobile screens make messages easier to read on any device or system.

# Adapting to Your Audience: Being Sensitive to Your Audience's Needs

1 LEARNING OBJECTIVE
Identify the four aspects of being sensitive to audience needs when writing business messages.

Readers and listeners are more likely to respond positively when they believe messages address their concerns.

Verne Ordman and other successful communicators will tell you that audiences tend to greet incoming messages with a selfish question: "What's in this for me?" If your target readers or listeners don't think a message applies to them, or if they don't think you are being sensitive to their needs, they won't pay attention. You can improve your audience sensitivity by adopting the "you" attitude, maintaining good standards of etiquette, emphasizing the positive, and using bias-free language.

## ADOPTING THE "YOU" ATTITUDE

Adopting the "you" attitude means speaking and writing in terms of your audience's wishes, interests, hopes, and preferences.

You are already becoming familiar with the audience-centered approach, trying to see a subject through your audience's eyes. Now you want to project this approach in your messages by adopting the **"you" attitude**—that is, by speaking and writing in terms of your audience's wishes, interests, hopes, and preferences.

On a simple level, you can adopt the "you" attitude by replacing terms that refer to yourself and your company with terms that refer to your audience. In other words, use *you* and *your* instead of *I*, *me*, *mine*, *we*, *us*, and *ours*:

| Instead of This | Write This |
|---|---|
| Tuesday is the only day that we can promise quick response to purchase order requests; we are swamped the rest of the week. | If you need a quick response, please submit your purchase order requests on Tuesday. |
| We offer MP3 players with 50, 75, or 100 gigabytes of storage capacity. | You can choose an MP3 player with 50, 75, or 100 gigabytes of storage. |

Of course, you will have occasions when it is entirely appropriate to write or speak from your perspective, such as when you are offering your opinions or reporting on something you have seen. However, even in those instances, make sure you focus on your readers' needs.

Also, be aware that the "you" attitude involves a lot more than just using particular pronouns. It's a matter of demonstrating genuine interest in your readers and concern for their needs (see Figure 4.1). You can use *you* 25 times in a single page and still offend your audience or ignore readers' true concerns. If you're writing to a retailer, try to think like a retailer; if you're dealing with a production supervisor, put yourself in that position; if you're writing to a dissatisfied customer, imagine how you would feel at the other end of the transaction.

Avoid using *you* and *your* when doing so
- Makes you sound dictatorial
- Makes someone else feel guilty
- Goes against your organization's style

Keep in mind that on some occasions it's better to avoid using *you*, particularly if doing so will sound overly authoritative or accusing. For instance, instead of saying, "You failed to deliver the customer's order on time," you could avoid the confrontational tone by saying, "The customer didn't receive the order on time," or "Let's figure out a system that will ensure on-time deliveries."

## MAINTAINING STANDARDS OF ETIQUETTE

Even if a situation calls for you to be brutally honest, express the facts of the matter in a kind and thoughtful manner.

Good etiquette shows respect for your audience and helps foster a more successful environment for communication by minimizing negative emotional reaction:

| Instead of This | Write This |
|---|---|
| Once again, you've managed to bring down the website through your incompetent programming. | Let's review the last website update to explore ways to improve the process. |
| You've been sitting on our order for two weeks, and we need it now! | Our production schedules depend on timely delivery of parts and supplies, but we have not yet received the order scheduled for delivery two weeks ago. Please respond today with a firm delivery commitment. |


MyBCommLab Apply Figure 4.1's key concepts by going to **mybcommlab.com**

**Figure 4.1 Fostering a Positive Relationship with an Audience**
CD Baby, the world's largest retailer of independent music, uses clear, positive language to help musicians understand the process of selling their music through the company and its affiliates. By making the effort to communicate clearly and succinctly, the company encourages a positive response from its target readers.
*Source:* http://members.cdbaby.com

Some situations naturally require more diplomacy than others. If you know your audience well, a less formal approach might be more appropriate. However, when you are communicating with people who outrank you or with people outside your organization, an added measure of courtesy is usually needed.

Use extra tact when communicating with people higher up the organization chart or outside the company.

Written messages and most forms of digital communication generally require more tact than oral communication. When you're speaking to someone live, you can soften your words by your tone of voice and facial expressions. Plus, you can adjust your approach according to the feedback you get. However, if you inadvertently offend someone in writing or in a podcast, for example, you usually don't get the immediate feedback you would need in order to resolve the situation. In fact, you may never know that you offended your audience.

## EMPHASIZING THE POSITIVE

You will encounter situations throughout your career in which you need to convey unwanted news. However, sensitive communicators understand the difference between delivering negative news and being negative. Never try to hide the negative news, but look for positive points that will foster a good relationship with your audience:[2]

You can communicate negative news without being negative.

| Instead of This | Write This |
|---|---|
| It is impossible to repair your laptop today. | Your computer can be ready by Tuesday. Would you like a loaner until then? |
| We wasted $300,000 advertising in that magazine. | Our $300,000 advertising investment did not pay off; let's analyze the experience and apply the insights to future campaigns. |

Show audience members how they will benefit by responding to your message.

If you're trying to persuade audience members to perform a particular action, point out how doing so will benefit them:

| Instead of This | Write This |
| --- | --- |
| We will notify all three credit reporting agencies if you do not pay your overdue bill within 10 days. | Paying your overdue bill within 10 days will prevent a negative entry on your credit record. |
| I am tired of seeing so many errors in the customer service blog. | Proofreading your blog postings will help avoid embarrassing mistakes that erode confidence in our brand. |

Euphemisms are milder synonyms that can express an idea while triggering fewer negative connotations, but they should never be used to obscure the truth.

Look for appropriate opportunities to use **euphemisms**, or milder synonyms, that convey your meaning without carrying negative connotations. For example, when referring to people beyond a certain age, use "senior citizens" rather than "old people." *Senior* conveys respect in a way that *old* doesn't.

However, take care when using euphemisms. It's easy to push the idea too far and wind up sounding ridiculous—or worse yet, obscuring the truth. Speaking to your local community about the disposal of "manufacturing by-products" would be unethical if you're really talking about toxic waste. Even if it is unpleasant, people respond better to an honest message delivered with integrity than they do to a sugar-coated message that obscures the truth.

## USING BIAS-FREE LANGUAGE

Bias-free language avoids words and phrases that unfairly and even unethically categorize or stigmatize people.

**Bias-free language** avoids words and phrases that unfairly and even unethically categorize or stigmatize people in ways related to gender, race, ethnicity, age, disability, or other personal characteristics. Contrary to what some might think, biased language is not simply about "labels." To a significant degree, language reflects the way people think and what they believe, and biased language may well perpetuate the underlying stereotypes and prejudices that it represents.[3] Moreover, because communication is largely about perception, being fair and objective isn't enough: To establish a good relationship with your audience, you must also *appear* to be fair.[4] Good communicators make every effort to change biased language (see Table 4.1). Bias can take a variety of forms:

- **Gender bias.** Avoid sexist language by using the same labels for everyone, regardless of gender. Don't refer to a woman as *chairperson* and then to a man as *chairman*. Use *chair*, *chairperson*, or *chairman* consistently. (Note that it is not uncommon to use *chairman* when referring to a woman who heads a board of directors. Archer Daniels Midland's Patricia Woertz and Xerox's Ursula Burns, for example, both refer to themselves as *chairman*.[5]) Reword sentences to use *they* or to use no pronoun at all rather than refer to all individuals as *he*. Note that the preferred title for women in business is *Ms.* unless the individual asks to be addressed as *Miss* or *Mrs.* or has some other title, such as *Dr.*
- **Racial and ethnic bias.** Avoid identifying people by race or ethnic origin unless such identification is relevant to the matter at hand—and it rarely is.
- **Age bias.** Mention the age of a person only when it is relevant. Moreover, be careful of the context in which you use words that refer to age; such words carry a variety of positive and negative connotations. For example, *young* can imply youthfulness, inexperience, or even immaturity, depending on how it's used.
- **Disability bias.** Physical, cognitive, sensory, or emotional impairments should never be mentioned in business messages unless those conditions are directly relevant to the subject. If you must refer to someone's disability, put the person first and the disability second.[6] For example, by saying "employees with physical disabilities," not "handicapped employees," you focus on the whole person, not the disability. Finally, never use outdated terminology such as *crippled* or *retarded*.

**REAL-TIME UPDATES**
LEARN MORE BY READING THIS PDF
**Get detailed advice on using bias-free language**
This in-depth guide offers practical tips for avoiding many types of cultural bias in your writing and speaking. Go to **http://real-timeupdates.com/bce7**. Under "Students," click on "Learn More."

**TABLE 4.1 Overcoming Bias in Language**

| Examples | Unacceptable | Preferable |
|---|---|---|
| **Gender Bias** | | |
| Using words containing *man* | Man-made | Artificial, synthetic, manufactured, constructed, human-made |
| | Mankind | Humanity, human beings, human race, people |
| | Manpower | Workers, workforce |
| | Businessman | Executive, manager, businessperson, professional |
| | Salesman | Sales representative, salesperson |
| | Foreman | Supervisor |
| Using female-gender words | Actress, stewardess | Actor, flight attendant |
| Using special designations | Woman doctor, male nurse | Doctor, nurse |
| Using *he* to refer to "everyone" | The average worker . . . he | The average worker . . . he or she *OR* Average workers . . . they |
| Identifying roles with gender | The typical executive spends four hours of his day in meetings. | Most executives spend four hours a day in meetings. |
| | The consumer . . . she | Consumers . . . they |
| | The nurse/teacher . . . she | Nurses/teachers . . . they |
| Identifying women by marital status | Mrs. Norm Lindstrom | Maria Lindstrom *OR* Ms. Maria Lindstrom |
| | Norm Lindstrom and Ms. Drake | Norm Lindstrom and Maria Drake *OR* Mr. Lindstrom and Ms. Drake |
| **Racial and Ethnic Bias** | | |
| Assigning stereotypes | Not surprisingly, Shing-Tung Yau excels in mathematics. | Shing-Tung Yau excels in mathematics. |
| Identifying people by race or ethnicity | Mario M. Cuomo, Italian-American politician and ex-governor of New York | Mario M. Cuomo, politician and ex-governor of New York |
| **Age Bias** | | |
| Including age when irrelevant | Mary Kirazy, 58, has just joined our trust department. | Mary Kirazy has just joined our trust department. |
| **Disability Bias** | | |
| Putting the disability before the person | Disabled workers face many barriers on the job. | Workers with physical disabilities face many barriers on the job. |
| | An epileptic, Tracy has no trouble doing her job. | Tracy's epilepsy has no effect on her job performance. |

# Adapting to Your Audience: Building Strong Relationships

Successful communication relies on a positive relationship between sender and receiver. Establishing your credibility and projecting your company's image are two vital steps in building and fostering positive business relationships.

**2 LEARNING OBJECTIVE** Explain how establishing your credibility and projecting your company's image are vital aspects of building strong relationships with your audience.

## ESTABLISHING YOUR CREDIBILITY

Audience responses to your messages depend heavily on your **credibility**, which is a measure of your believability and is based on how reliable you are and how much trust you evoke in others. With audiences who don't know you and trust you already, you need to establish credibility before they'll accept your messages (see Figure 4.2 on the next page). On the other hand, when you do establish credibility, communication becomes much easier because you no longer have to spend time and energy convincing people that you are a

People are more likely to react positively to your message when they have confidence in you.

Photography plays an important role because clients are essentially "buying" Fraley when they buy his services. These images show him to be friendly, engaging, and confident.

The first paragraph summarizes his business background, which sends a strong message that he has the experience to back up the advice he gives.

Describing some of his career-accomplishments provides persuasive support to his high-level message of being an innovator himself—not just somebody who knows how to talk about innovation.

Listing publications that have quoted him adds to his credibility as a respected expert in the field.


**Figure 4.2 Building Credibility**
Gregg Fraley is a highly regarded expert in the field of creativity and business innovation, but because his services are intangible, potential clients can't "test drive" those services before making a purchase decision. He therefore takes special care to build credibility as part of his communication efforts.
*Source:* Gregg Fraley Enterprises.

trustworthy source of information and ideas. To build, maintain, or repair your credibility, emphasize the following characteristics:

To enhance your credibility, emphasize such factors as honesty, objectivity, and awareness of audience needs.

- **Honesty.** Demonstrating honesty and integrity will earn you the respect of your audiences, even if they don't always agree with or welcome your messages.
- **Objectivity.** Show that you can distance yourself from emotional situations and look at all sides of an issue.
- **Awareness of audience needs.** Directly or indirectly, let your audience members know that you understand what's important to them.
- **Credentials, knowledge, and expertise.** Audiences need to know that you have whatever it takes to back up your message, whether it's education, professional certification, special training, past successes, or simply the fact that you've done your research.
- **Endorsements.** An *endorsement* is a statement on your behalf by someone who is accepted by your audience as an expert.
- **Performance.** Demonstrating impressive communication skills is not enough; people need to know they can count on you to get the job done.
- **Confidence.** Audiences need to know that you believe in yourself and your message. If you are convinced that your message is sound, you can state your case confidently, without sounding boastful or arrogant.
- **Sincerity.** When you offer praise, don't use *hyperbole*, such as "You are the most fantastic employee I could ever imagine." Instead, point out specific qualities that warrant praise.

**REAL-TIME UPDATES**
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**Building credibility online**
Follow these steps to build your credibility as an online voice. Go to **http://real-timeupdates.com/bce7**. Under "Students," click on "Learn More."

Be aware that credibility can take days, months, even years to establish—and it can be wiped out in an instant. An occasional mistake or letdown may be forgiven, but major lapses in honesty or integrity can destroy your reputation.

### PROJECTING YOUR COMPANY'S IMAGE

When you communicate with anyone outside your organization, it is more than a conversation between two individuals. You represent your company and therefore play a vital role in helping the company build and maintain positive relationships with all of its stakeholders. Most successful companies work hard to foster a specific public image, and your external communication efforts need to project that image. As part of this responsibility, the interests and preferred communication style of your company must take precedence over your own views and personal communication style.

Your company's interests and reputation take precedence over your personal views and communication style.

Many organizations have specific communication guidelines that show everything from the correct use of the company name to preferred abbreviations and other grammatical details. Specifying a desired style of communication is more difficult, however. Observe more experienced colleagues to see how they communicate, and never hesitate to ask for editorial help to make sure you're conveying the appropriate tone. For instance, with clients entrusting thousands or millions of dollars to it, an investment firm communicates in a style quite different from that of a clothing retailer. And a clothing retailer specializing in high-quality business attire communicates in a different style than a store catering to the latest trends in casual wear.

## Adapting to Your Audience: Controlling Your Style and Tone

Your communication **style** involves the choices you make to express yourself: the words you select, the manner in which you use those words in sentences, and the way you build paragraphs from individual sentences. Your style creates a certain **tone**, or overall impression, in your messages. The right tone depends on the nature of your message and your relationship with the reader.

3 LEARNING OBJECTIVE
Explain how to achieve a tone that is conversational but businesslike, explain the value of using plain language, and define active and passive voice.

### CREATING A CONVERSATIONAL TONE

The tone of your business messages can range from informal to conversational to formal. If you're in a large organization and you're communicating with your superiors or with customers, the right tone will usually be more formal and respectful.[7] However, that same tone might sound distant and cold in a small organization or if used with close colleagues. Part of the challenge of communicating on the job is to read each situation and figure out the appropriate tone to use.

Most business messages aim for a conversational style that is warm but businesslike.

Compare the three versions of the message in Table 4.2 on the next page. The first is too formal and stuffy for today's audiences, whereas the third is too casual for any audience other than close associates or friends. The second message demonstrates the **conversational tone** used in most business communication—plain language that sounds businesslike without being stuffy at one extreme or too laid-back and informal at the other extreme. You can achieve a tone that is conversational but still businesslike following these guidelines:

- **Understand the difference between texting and writing.** The casual, acronym-filled language friends often use in text messaging, IM, and social networks is not considered professional business writing. Yes, it is an efficient way for friends to communicate—particularly taking into account the limitations of a phone keypad—but if you want to be taken seriously in business, you simply cannot write like this on the job.
- **Avoid obsolete and pompous language.** Most companies now shy away from such dated phrases as "attached please find" and "please be advised that." Similarly, avoid using obscure words, stale or clichéd expressions, and complicated sentences whose only intent is to impress others.

**TABLE 4.2 Formal, Conversational, and Informal Tones**

| Tone | Example |
|---|---|
| **Stuffy:** too formal for today's audiences | Dear Ms. Navarro:<br>Enclosed please find the information that was requested during our telephone communication of May 14. As was mentioned at that time, Midville Hospital has significantly more doctors of exceptional quality than any other health facility in the state.<br>As you were also informed, our organization has quite an impressive network of doctors and other health-care professionals with offices located throughout the state. In the event that you should need a specialist, our professionals will be able to make an appropriate recommendation.<br>In the event that you have questions or would like additional information, you may certainly contact me during regular business hours.<br>Most sincerely yours,<br>Samuel G. Berenz |
| **Conversational:** just right for most business communication | Dear Ms. Navarro:<br>Here's the information you requested during our phone conversation on Friday. As I mentioned, Midville Hospital has the highest-rated doctors and more of them than any other hospital in the state.<br>In addition, we have a vast network of doctors and other health professionals with offices throughout the state. If you need a specialist, they can refer you to the right one.<br>If you would like more information, please call any time between 9:00 and 5:00, Monday through Friday.<br>Sincerely,<br>Samuel G. Berenz |
| **Unprofessional:** too casual for business communication | Here's the 411 you requested. IMHO, we have more and better doctors than any other hospital in the state.<br>FYI, we also have a large group of doctors and other health professionals w/offices close to U at work/home. If U need a specialist, they'll refer U to the right one<br>Any? just ring or msg.<br>L8R,<br>S |

- **Avoid preaching and bragging.** Readers tend to get irritated by know-it-alls who like to preach or brag. However, if you need to remind your audience of something that should be obvious, try to work in the information casually, perhaps in the middle of a paragraph, where it will sound like a secondary comment rather than a major revelation.
- **Be careful with intimacy.** Business messages should generally avoid intimacy, such as sharing personal details or adopting a casual, unprofessional tone. However, when you have a close relationship with audience members, such as among the members of a close-knit team, a more intimate tone is sometimes appropriate and even expected.
- **Be careful with humor.** Humor can easily backfire and divert attention from your message. If you don't know your audience well or you're not skilled at using humor in a business setting, don't use it at all. Avoid humor in formal messages and when you're communicating across cultural boundaries.

## USING PLAIN LANGUAGE

Audiences can understand and act on plain language without reading it over and over.

An important aspect of creating a conversational tone is using *plain language* (or *plain English* specifically when English is involved). Plain language presents information in a simple, unadorned style that allows your audience to easily grasp your meaning—language that recipients "can read, understand and act upon the first time they read it."[8] You can see how this definition supports using the "you" attitude and shows respect for your audience (see Figure 4.3). In addition, plain language can make companies more productive and more profitable because people spend less time trying to figure out messages that are confusing or aren't written to meet their needs.[9]

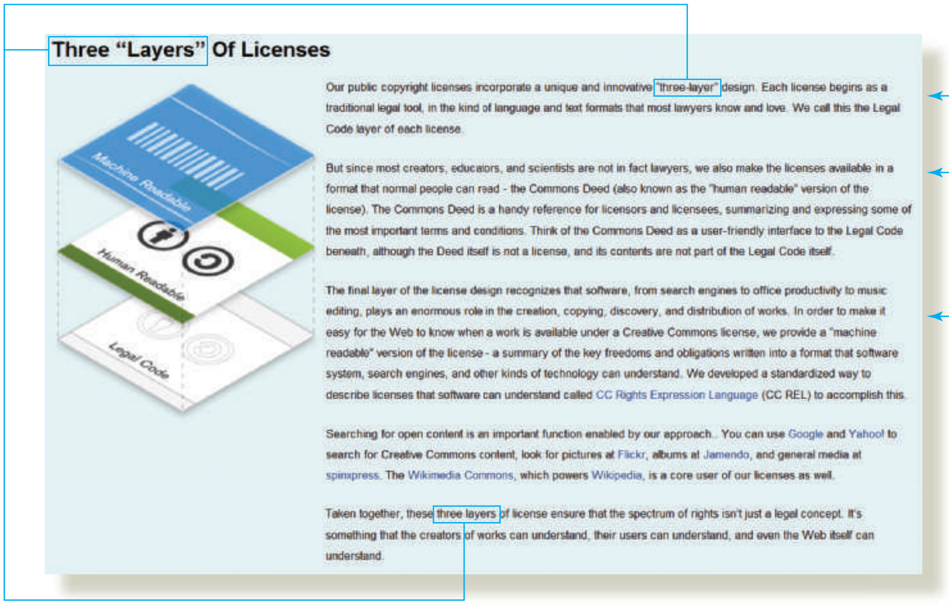
**REAL-TIME UPDATES**

LEARN MORE BY READING THIS ARTICLE

**Take your communication skills from good to great**

These seven tips can help you transform your business writing from merely ordinary to powerful and persuasive. Go to **http://real-timeupdates.com/bce7**. Under "Students," click on "Learn More."

The notion of three layers is carried through the text and reinforced with the diagram.




The introductory sentence expresses the main idea, that the licenses are built in three layers (note that "use" would be a simpler alternative to "incorporate").

The paragraph on the "human readable" version explains why it exists and whom it benefits.

The purpose and function of the "machine readable" version are less obvious than in the other two versions, so this paragraph offers a more extensive explanation.

**Figure 4.3 Plain Language at Creative Commons**
Creative Commons uses this diagram and text to explain the differences among its three versions of content licenses.
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## SELECTING ACTIVE OR PASSIVE VOICE

The choice of active or passive voice also affects the tone of your message. In a sentence written in the **active voice**, the subject performs the action and the object receives the action: "Jodi sent the email message." In a sentence written in the **passive voice**, the subject receives the action: "The email message was sent by Jodi." As you can see, the passive voice combines the helping verb *to be* with a form of the verb that is usually similar to the past tense.

Using the active voice often makes your writing more direct, livelier, and easier to read (see Table 4.3 on the next page). Passive voice is not wrong grammatically, but it can be cumbersome, lengthy, and vague. In most cases, the active voice is the better choice.[10] Nevertheless, using the passive voice can help you demonstrate the "you" attitude in some situations:

Active sentences are usually stronger than passive ones.

- When you want to be diplomatic about pointing out a problem or an error
- When you want to point out what's being done without taking or attributing either the credit or the blame
- When you want to avoid personal pronouns (*I* and *we*) in order to create an objective tone

Use passive sentences to soften bad news, to put yourself in the background, or to create an impersonal tone when needed.

The second half of Table 4.3 illustrates several situations in which the passive voice helps you focus your message on your audience.

# Composing Your Message: Choosing Powerful Words

After you have decided how to adapt to your audience, you're ready to begin composing your message. As you write your first draft, let your creativity flow. Don't try to draft and edit at the same time, and don't worry about getting everything perfect. Make up words if you can't think of the right ones, draw pictures, or talk out loud—do whatever it takes to get the ideas out of your head and onto your computer screen or a piece of paper. If you've planned carefully, you'll have time to revise and refine the material later. In fact, many

4 LEARNING OBJECTIVE
Describe how to select words that are not only correct but also effective.

**TABLE 4.3 Choosing Active or Passive Voice**

*In general, avoid passive voice to make your writing lively and direct.*

| Dull and Indirect in Passive Voice | Lively and Direct in Active Voice |
|---|---|
| The new procedure was developed by the operations team. | The operations team developed the new procedure. |
| Legal problems are created by this contract. | This contract creates legal problems. |
| Reception preparations have been undertaken by our PR people for the new CEO's arrival. | Our PR people have begun planning a reception for the new CEO. |

*However, passive voice is helpful when you need to be diplomatic or want to focus attention on problems or solutions rather than on people.*

| Accusatory or Self-Congratulatory in Active Voice | More Diplomatic in Passive Voice |
|---|---|
| You lost the shipment. | The shipment was lost. |
| I recruited seven engineers last month. | Seven engineers were recruited last month. |
| We are investigating the high rate of failures on the final assembly line. | The high rate of failures on the final assembly line is being investigated. |

writers find it helpful to establish a personal rule of never showing a first draft to anyone. By working in this "safe zone," away from the critical eyes of others, your mind will stay free to think clearly and creatively.

Correctness is the first consideration when choosing words.

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Dragon Dictation uses voice recognition to convert speech to text at up to five times faster than typing.

You may find it helpful to hone your craft by viewing your writing at three levels: strong words, effective sentences, and coherent paragraphs. Starting at the word level, successful writers pay close attention to the correct use of words.[11] If you make errors of grammar or usage, you lose credibility with your audience—even if your message is otherwise correct. Poor grammar suggests to readers that you lack professionalism, and they may choose not to trust you as an unprofessional source. Moreover, poor grammar may imply that you don't respect your audience enough to get things right.

The rules of grammar and usage can be a source of worry for writers because some of these rules are complex and some evolve over time. Even professional editors and grammarians occasionally have questions about correct usage, and they may disagree about the answers. For example, the word *data* is the plural form of *datum*, yet some experts now prefer to treat *data* as a singular noun when it's used in nonscientific material to refer to a body of facts or figures.

With practice, you'll become more skilled in making correct choices over time. If you have doubts about what is correct, you have many ways to find the answer. Check the Handbook of Grammar, Mechanics, and Usage at the end of this book, or consult the many special reference books and resources available in libraries, in bookstores, and on the Internet.

Effectiveness is the second consideration when choosing words.

In addition to using words correctly, successful writers and speakers take care to use the most effective words and phrases. Selecting and using words effectively is often more challenging than using words correctly because doing so is a matter of judgment and experience. Careful writers continue to work at their craft to find words that communicate with power (see Figure 4.4).

The more abstract a word is, the more it is removed from the tangible, objective world of things that can be perceived with the senses.

## BALANCING ABSTRACT AND CONCRETE WORDS

The nouns in your business messages can vary dramatically in their degree of abstraction or concreteness. An **abstract word** expresses a concept, quality, or characteristic. Abstractions are usually broad, encompassing a category of ideas, and are often intellectual, academic, or philosophical. *Love*, *honor*, *progress*, *tradition*, and *beauty* are abstractions, as are such important business concepts as *productivity*, *quality*, and *motivation*. In contrast, a **concrete word** stands for something you can touch, see, or visualize. Most concrete terms are anchored in the tangible, material world. *Chair*, *green*, *two*, *database*, and *website* are concrete words; they are direct, clear, and exact.

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This comprehensive online guide can help you out of just about any grammar dilemma. Go to **http://real-timeupdates.com/bce7**. Under "Students," click on "Learn More."

*Robust* goes beyond simply *strong* to suggest *resilient* and *comprehensive* as well.

In many cases, *global* is an absolute term and doesn't benefit from a modifier such as *truly*. However, economic globalization is occurring in stages, so *truly* here suggests the point at which globalization is nearly complete.

*Gold standard* (a term borrowed from economics) refers to something against which all similar entities are compared, an unsurpassed model of excellence.

In the context of a survey *significant* means more than just *important*; it indicates a statistical observation that is large enough to be more than mere chance. *Positive* indicates the direction of the change and suggests *affirmation* and *progress*.

*Claim* is a powerful word here because it suggests a strong element of doubt.

*Carve out* is much stronger than *remove* because it could suggest surgical precision if done well or perhaps violent destruction if not done with finesse. In this context, *carve out* is meant to express a concern about countries weakening the international financial standards by modifying them to meet their own needs.

The diplomatic use of passive voice keeps the focus on the issue at hand, rather than on the organizations that are involved.

### Two Sides of the Story

Growing interest in the global acceptance of a single set of robust accounting standards comes from all participants in the capital markets. Many multinational companies and national regulators and users support it because they believe that the use of common standards in the preparation of public company financial statements will make it easier to compare the financial results of reporting entities from different countries. They believe it will help investors understand opportunities better. Large public companies with subsidiaries in multiple jurisdictions would be able to use one accounting language company-wide and present their financial statements in the same language as their competitors.

Another benefit some believe is that in a truly global economy, financial professionals including CPAs will be more mobile, and companies will more easily be able to respond to the human capital needs of their subsidiaries around the world.

Nevertheless, many people also believe that U.S. GAAP is the gold standard, and something will be lost with full acceptance of IFRS. However, recent SEC actions and global trends have increased awareness of the need to address possible adoption. According to a survey conducted in the first half of 2008 by Deloitte & Touche among chief financial officers and other financial professionals, U.S. companies have an interest in adopting IFRS and this interest is steadily growing. Thirty percent would consider adopting IFRS now, another 28 percent are unsure or do not have sufficient knowledge to decide, while 42 percent said they would not. Still, an AICPA survey conducted in Fall 2008 among its CPA members shows a significant and positive shift in the number of firms and companies that are starting to prepare for eventual adoption of IFRS. A 55 percent majority of CPAs at firms and companies nationwide said they are preparing in a variety of ways for IFRS adoption, an increase of 14 percentage points over the 41 percent who were preparing for change, according to an April 2008 AICPA survey.

Another concern is that worldwide many countries that claim to be converging to international standards may never get 100 percent compliance. Most reserve the right to carve out selectively or modify standards they do not consider in their national interest, an action that could lead to incompatibility—the very issue that IFRS seek to address.

### GAAP and IFRS, Still Differences

Great strides have been made by the FASB and the IASB to converge the content of IFRS and U.S. GAAP. The goal is that by the time the SEC allows or mandates the use of IFRS for U.S. publicly traded companies, most or all of the key differences will have been resolved.

Because of these ongoing convergence projects, the extent of the specific differences between IFRS and U.S. GAAP is shrinking. Yet significant differences do remain. For example:

- IFRS does not permit Last In First Out (LIFO) as an inventory costing method.
- IFRS uses a single-step method for impairment write-downs rather than the two-step method used in U.S. GAAP, making write-downs more likely.
- IFRS has a different probability threshold and measurement objective for contingencies.
- IFRS does not permit curing debt covenant violations after year-end.
- IFRS guidance regarding revenue recognition is less extensive than GAAP and contains relatively little industry-specific instructions.

5

**Figure 4.4 Choosing Powerful Words**
Notice how careful word choices help this excerpt from a report published by the American Institute of Certified Public Accountants make a number of important points. The tone is formal, which is appropriate for a report with global, public readership. (GAAP refers to accounting standards currently used in the United States; IFRS refers to international standards.)
*Source:* ©2013 AICPA used by permission.

MyBCommLab Apply Figure 4.4's key concepts by going to **mybcommlab.com**

Of the two types, abstractions tend to cause more trouble because they are often "fuzzy" and can be interpreted differently, depending on the audience and the circumstances. The best way to minimize such problems is to balance abstract terms with concrete ones. State the concept, then pin it down with details expressed in more concrete terms. Save the abstractions for ideas that cannot be expressed any other way.

## FINDING WORDS THAT COMMUNICATE WELL

When you compose business messages, look for the most powerful words for each situation (see Table 4.4 on the next page):

Try to use words that are powerful and familiar.

- **Choose strong, precise words.** Choose words that express your thoughts clearly, specifically, and strongly. If you find yourself using many adjectives and adverbs, chances

**TABLE 4.4 Selected Examples of Finding Powerful Words**

| Potentially Weak Words and Phrases | Stronger Alternatives (effective usage depends on the situation) |
|---|---|
| Increase (as a verb) | Accelerate, amplify, augment, enlarge, escalate, expand, extend, magnify, multiply, soar, swell |
| Decrease (as a verb) | Curb, cut back, depreciate, dwindle, shrink, slacken |
| Large, small | (use a specific number, such as $100 million) |
| Good | Admirable, beneficial, desirable, flawless, pleasant, sound, superior, worthy |
| Bad | Abysmal, corrupt, deficient, flawed, inadequate, inferior, poor, substandard, worthless |
| We are committed to providing . . . | We provide . . . |
| It is in our best interest to . . . | We should . . . |
| **Unfamiliar Words** | **Familiar Words** |
| Ascertain | Find out, learn |
| Consummate | Close, bring about |
| Peruse | Read, study |
| Circumvent | Avoid |
| Unequivocal | Certain |
| **Clichés and Buzzwords** | **Plain Language** |
| An uphill battle | A challenge |
| Writing on the wall | Prediction |
| Call the shots | Lead |
| Take by storm | Attack |
| Costs an arm and a leg | Expensive |
| A new ball game | Fresh start |
| Fall through the cracks | Be overlooked |
| Think outside the box | Be creative |
| Run it up the flagpole | Find out what people think about it |
| Eat our own dog food | Use our own products |
| Mission-critical | Vital |
| Disintermediate | Get rid of |
| Green light (as a verb) | Approve |
| Architect (as a verb) | Design |
| Space (as in, "we compete in the XYZ space") | Market or industry |
| Blocking and tackling | Basic skills |
| Trying to boil the ocean | Working frantically but without focus |
| Human capital | People, employees, workforce |
| Low-hanging fruit | Tasks that are easy to complete or sales that are easy to close |
| Pushback | Resistance |

are you're trying to compensate for weak nouns and verbs. Saying that *sales plummeted* is stronger and more efficient than saying *sales dropped dramatically* or *sales experienced a dramatic drop*.

- **Choose familiar words.** You'll communicate best with words that are familiar to both you and your readers. Moreover, trying to use unfamiliar words can lead to embarrassing mistakes.
- **Avoid clichés and use buzzwords carefully.** Although familiar words are generally the best choice, avoid *clichés*—terms and phrases so common that they have lost some

Avoid clichés, be extremely careful with trendy buzzwords, and use jargon only when your audience is completely familiar with it.

of their power to communicate. *Buzzwords*, newly coined terms often associated with technology, business, or cultural changes, are more difficult to handle than clichés because in small doses and in the right situations, they can be useful. The careful use of a buzzword can signal that you're an insider, someone in the know.[12] However, buzzwords quickly become clichés, and using them too late in their "life cycle" can mark you as an outsider desperately trying to look like an insider.

- **Use jargon carefully.** *Jargon*, the specialized language of a particular profession or industry, has a bad reputation, but it's not always bad. Using jargon is usually an efficient way to communicate within the specific groups that understand these terms. After all, that's how jargon develops in the first place, as people with similar interests develop ways to communicate complex ideas quickly.

If you need help finding the right words, try some of the visual dictionaries and thesauruses available online.

**MOBILE APPS**
The Advanced English Dictionary and Thesaurus helps you find the right word by organizing words according to their relationship with other words.

## Composing Your Message: Creating Effective Sentences

Arranging your carefully chosen words in effective sentences is the next step in creating successful messages. Start by selecting the best type of sentence to communicate each point you want to make.

**5 LEARNING OBJECTIVE** Define the four types of sentences, and explain how sentence style affects emphasis within a message.

### CHOOSING FROM THE FOUR TYPES OF SENTENCES

Sentences come in four basic varieties: simple, compound, complex, and compound-complex. A **simple sentence** has one main clause (a single subject and a single predicate), although it may be expanded by nouns and pronouns serving as objects of the action and by modifying phrases. Consider this example (with the subject underlined once and the predicate verb underlined twice):

A simple sentence has one main clause.

Profits increased 35 percent in the past year.

A **compound sentence** has two main clauses that express two or more independent but related thoughts of equal importance, usually joined by *and*, *but*, or *or*. In effect, a compound sentence is a merger of two or more simple sentences (independent clauses) that are related. For example:

A compound sentence has two main clauses.

Wages declined by 5 percent, and employee turnover has been higher than ever.

The independent clauses in a compound sentence are always separated by a comma or by a semicolon (in which case the conjunction—*and*, *but*, or *or*—is dropped).

A **complex sentence** expresses one main thought (the independent clause) and one or more subordinate thoughts (dependent clauses) related to it, often separated by a comma. The subordinate thought, which comes first in the following sentence, could not stand alone:

A complex sentence has one main clause and one subordinate clause.

Although you may question Gerald's conclusions, you must admit that his research is thorough.

A compound-complex sentence has two main clauses and at least one dependent clause.

A **compound-complex sentence** has two main clauses, at least one of which contains a subordinate clause:

> Profits increased 35 percent in the past year, so although the company faces long-term challenges, I agree that its short-term prospects look quite positive.

Maintain some variety among the four sentence types to keep your writing from getting choppy (too many short, simple sentences) or exhausting (too many long sentences).

Strive for variety and balance using all four sentence types. If you use too many simple sentences, you won't be able to properly express the relationships among your ideas, and your writing will sound choppy and abrupt. At the other extreme, a long series of compound, complex, or compound-complex sentences can be tiring to read.

## USING SENTENCE STYLE TO EMPHASIZE KEY THOUGHTS

Emphasize specific parts of sentences by

- Devoting more words to them
- Putting them at the beginning or at the end of the sentence
- Making them the subject of the sentence

In every message, some ideas are more important than others. You can emphasize key ideas through your sentence style. One obvious technique is to give important points the most space. When you want to call attention to a thought, use extra words to describe it. Consider this sentence:

> The chairperson called for a vote of the shareholders.

To emphasize the importance of the chairperson, you might describe her more fully:

> Having considerable experience in corporate takeover battles, the chairperson called for a vote of the shareholders.

You can increase the emphasis even more by adding a separate, short sentence to augment the first:

> The chairperson called for a vote of the shareholders. She has considerable experience in corporate takeover battles.

You can also call attention to a thought by making it the subject of the sentence. In the following example, the emphasis is on the person:

> I can write letters much more quickly using a computer.

However, when you change the subject, the computer takes center stage:

> The computer enables me to write letters much more quickly.

**REAL-TIME UPDATES**

LEARN MORE BY READING THIS ARTICLE

**Practical tips for more-effective sentences**

The *Writer's Handbook* from the University of Wisconsin offers tips on writing clear, concise sentences. Go to **http://real-timeupdates.com/bce7**. Under "Students," click on "Learn More."

Another way to emphasize an idea is to place it either at the beginning or at the end of a sentence:

> **Less emphatic:** We are cutting the price to stimulate demand.
> **More emphatic:** To stimulate demand, we are cutting the price.

In complex sentences, the ideal placement of the dependent clause depends on the relationship between the ideas expressed. If you want to emphasize the idea expressed in the dependent clause, put that clause at the end of the sentence (the most emphatic position) or at the beginning (the second most emphatic position). If you want to downplay the idea, position the dependent clause within the sentence.

The best placement of the dependent clause depends on the relationship between the ideas in the sentence.

> **Most emphatic:** The electronic parts are manufactured in Mexico, <u>which has lower wage rates than the United States</u>.
> **Emphatic:** <u>Because wage rates are lower in Mexico than in the United States</u>, the electronic parts are manufactured there.
> **Least emphatic:** Mexico, <u>which has lower wage rates than the United States</u>, was selected as the production site for the electronic parts.

Techniques such as these give you a great deal of control over the way your audience interprets what you have to say.

# Composing Your Message: Crafting Coherent Paragraphs

**6 LEARNING OBJECTIVE** Define the three key elements of a paragraph, and list five ways to develop coherent paragraphs.

Paragraphs organize sentences related to the same general topic. Readers expect every paragraph to be *unified*—focusing on a single topic—and *coherent*—presenting ideas in a logically connected way. By carefully arranging the elements of each paragraph, you help your readers grasp the main idea of your document and understand how the specific pieces of support material back up that idea.

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Pages is a full-featured word processing app for iOS devices.

## CREATING THE ELEMENTS OF A PARAGRAPH

Paragraphs vary widely in length and form, but most contain three basic elements: a topic sentence, support sentences that develop the topic, and transitional words and phrases.

Most paragraphs consist of
- A topic sentence that reveals the subject of the paragraph
- Related sentences that support and expand the topic
- Transitions that help readers move between sentences and paragraphs

### Topic Sentence

Most effective paragraphs deal with a single topic, and the sentence that introduces that topic is called the **topic sentence** (see Figure 4.5 on the next page). This sentence, usually the first one in the paragraph, gives readers a summary of the general idea that will be covered in the rest of the paragraph. The following examples show how a topic sentence can introduce the subject and suggest the way the subject will be developed:

> The medical products division has been troubled for many years by public relations problems. [In the rest of the paragraph, readers will learn the details of the problems.]
> To get a refund, please supply us with the following information. [The details of the necessary information will be described in the rest of the paragraph.]

### Support Sentences

In most paragraphs, the topic sentence needs to be explained, justified, or extended with one or more support sentences. These sentences must be related to the topic and provide examples, evidence, and clarification:

> The medical products division has been troubled for many years by public relations problems. Since 2014 the local newspaper has published 15 articles that portray the division in a negative light. We have been accused of everything from mistreating laboratory animals to polluting the local groundwater. Our facility has been described as a health hazard. Our scientists are referred to as "Frankensteins," and our profits are considered "obscene."

The post title or headline serves as a "topic sentence" for the entire article.

The subheadings, which are actually complete sentences with the implied subject "you," convey the key message of each paragraph that follows.

Each paragraph expands on the topic expressed in its subheading, offering examples and more-detailed advice.


**Figure 4.5 Topic Sentences**
In this blog post, informative subheadings function as topic sentences for the paragraphs that follow.
*Source:* Ignite Social Media.

Notice how these support sentences are all more specific than the topic sentence. Each one provides another piece of evidence to demonstrate the general truth of the main thought. Also, each sentence is clearly related to the general idea being developed, which gives the paragraph its unity. A paragraph is well developed when it contains enough information to make the topic sentence convincing and interesting and doesn't contain any unneeded or unrelated sentences.

## Transitions

**Transitions** connect ideas by showing how one thought is related to another. They also help alert the reader to what lies ahead so that shifts and changes don't cause confusion. In addition to helping readers understand the connections you're trying to make, transitions give your writing a smooth, even flow.

Depending on the specific need within a document, transitional elements can range in length from a single word to an entire paragraph or more. You can establish transitions in a variety of ways:

- **Use connecting words.** Use words such as *and*, *but*, *or*, *nevertheless*, *however*, and *in addition*.

- **Echo a word or phrase from a previous paragraph or sentence.** "A system should be established for monitoring inventory levels. This system will provide . . ."
- **Use a pronoun that refers to a noun used previously.** "Ms. Arthur is the leading candidate for the president's position. She has excellent qualifications."
- **Use words that are frequently paired.** "The machine has a *minimum* output of. . . Its *maximum* output is . . ."

Transitional elements include
- Connecting words (conjunctions)
- Repeated words or phrases
- Pronouns
- Words that are frequently paired

Some transitions serve as mood changers, alerting the reader to a change in mood from the previous material. Some announce a total contrast with what's gone on before, some announce a cause-and-effect relationship, and some signal a change in time. Here is a list of common transitions:

**Additional detail:** moreover, furthermore, in addition, besides, first, second, third, finally
**Cause-and-effect relationship:** therefore, because, accordingly, thus, consequently, hence, as a result, so
**Comparison:** similarly, here again, likewise, in comparison, still
**Contrast:** yet, conversely, whereas, nevertheless, on the other hand, however, but, nonetheless
**Condition:** although, if
**Illustration:** for example, in particular, in this case, for instance
**Time sequence:** formerly, after, when, meanwhile, sometimes
**Intensification:** indeed, in fact, in any event
**Summary:** in brief, in short, to sum up
**Repetition:** that is, in other words, as I mentioned earlier

Consider using a transition whenever it might help the reader understand your ideas and follow you from point to point. You can use transitions inside paragraphs to tie together related points and between paragraphs to ease the shift from one distinct thought to another. In longer reports, a transition that links major sections or chapters is often a complete paragraph that serves as a summary of the ideas presented in the section just ending and/or as a mini-introduction to the next section.

### DEVELOPING PARAGRAPHS

Five ways to develop paragraphs:
- Illustration
- Comparison or contrast
- Cause and effect
- Classification
- Problem and solution

You have a variety of options for developing paragraphs, each of which can convey a specific type of idea. Five of the most common approaches are illustration, comparison or contrast, cause and effect, classification, and problem and solution (see Table 4.5 on the next page).

## Writing Messages for Mobile Devices

7 LEARNING OBJECTIVE
List five techniques for writing effective messages for mobile readers.

One obvious adaptation to make for audiences using mobile devices is to modify the design and layout of your messages to fit smaller screen sizes and different user interface features (see Chapter 5). However, modifying your approach to writing is also important. Reading is more difficult on small screens, and consequently users' ability to comprehend what they read on mobile devices is lower than it is on larger screens.[13] Use these five techniques to make your mobile messages more effective:

To write effectively for mobile devices
- Use a linear organization
- Prioritize information
- Write short, focused messages
- Use short subject lines and headings
- Use short paragraphs

- **Use a linear organization.** In a printed document or on a larger screen, readers can easily take in multiple elements on a page, such as preview or summary boxes, tables and other supporting visuals, and sidebars with related information. All these elements are in view at the same time, so readers can jump around the page to read various parts without feeling lost. However, with small mobile device screens, a complicated organization requires readers to zoom in and out and pan around to see all these elements at readable text sizes.

TABLE 4.5 **Five Techniques for Developing Paragraphs**

| Technique | Description | Example |
|---|---|---|
| Illustration | Giving examples that demonstrate the general idea | Some of our most popular products are available through local distributors. For example, Everett & Lemmings carries our frozen soups and entrees. The J. B. Green Company carries our complete line of seasonings, as well as the frozen soups. Wilmont Foods, also a major distributor, now carries our new line of frozen desserts. |
| Comparison or contrast | Using similarities or differences to develop the topic | When the company was small, the recruiting function could be handled informally. The need for new employees was limited, and each manager could comfortably screen and hire her or his own staff. However, our successful bid on the Owens contract means that we will be doubling our labor force over the next six months. To hire that many people without disrupting our ongoing activities, we will create a separate recruiting group within the human resources department. |
| Cause and effect | Focusing on the reasons for something | The heavy-duty fabric of your Wanderer tent probably broke down for one of two reasons: (1) a sharp object punctured the fabric, and without reinforcement, the hole was enlarged by the stress of pitching the tent daily for a week or (2) the fibers gradually rotted because the tent was folded and stored while still wet. |
| Classification | Showing how a general idea is broken into specific categories | Successful candidates for our supervisor trainee program generally come from one of several groups. The largest group by far consists of recent graduates of accredited business management programs. The next largest group comes from within our own company, as we try to promote promising staff workers to positions of greater responsibility. Finally, we occasionally accept candidates with outstanding supervisory experience in related industries. |
| Problem and solution | Presenting a problem and then discussing the solution | Selling handmade toys online is a challenge because consumers are accustomed to buying heavily advertised toys from major chain stores or well-known websites such as Amazon.com. However, if we develop an appealing website, we can compete on the basis of product novelty and quality. In addition, we can provide unusual crafts at a competitive price: a rocking horse of birch, with a hand-knit tail and mane; a music box with the child's name painted on the top; and a real teepee made by Native American artisans. |

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Usability experts at Nielsen Norman Group offer dozens of research-based articles on effective communication using mobile devices and other technologies. Go to **http://real-timeupdates.com/bce7**. Under "Students," click on "Learn More."

This makes reading slower and raises the odds that readers will get disoriented and lose the thread of the message because they can't see the big picture. To simplify reading, organize with a linear flow from the top to the bottom of the message or article.

- **Prioritize information.** Small screens make it difficult for readers to scan the page to find the information they want most. Prioritize the information based on what you know about their needs and put that information first.[14] Use the *inverted pyramid* style favored by journalists, in which you reveal the most important information briefly at first and then provide successive layers of detail that readers can consume if they want. Note that you may need to avoid using the indirect approach (see page 116) if your message is complicated, because it will be more difficult for readers to follow your chain of reasoning.
- **Write shorter and more-focused messages and documents.** Mobile users often lack the patience or opportunity to read lengthy messages or documents, so keep it short.[15] In some cases, this could require you to write two documents, a shorter *executive summary* (see page 324) for mobile use and a longer supporting document that readers can access with their PCs if they want more details.
- **Use shorter subject lines and headings.** Mobile devices, particularly phones, can't display as many characters in a single line of text as the typical computer screen can. Depending on the app or website, email subject lines and page headings will be truncated or will wrap around to take up multiple lines. Both formats make reading more difficult. A good rule of thumb is to keep subject lines and headlines to around 25 characters.[16] This doesn't give you much text to work with, so make every word count and make sure you start with the key words so readers can instantly see what the subject line or heading is about.[17]
- **Use shorter paragraphs.** In addition to structuring a message according to discrete blocks of information, paragraphs have a visual role in written communication as well. Shorter paragraphs are less intimidating and let readers take frequent "micro rests" as they move through a document. Because far less text is displayed at once on a mobile screen, keep paragraphs as short as possible so readers don't have to swipe through screen after screen before getting to paragraph breaks.

Compare the two messages in Figure 4.6 to get a sense of how to write reader-friendly mobile content.


Figure 4.6a

The text from this conventional report page is too small to read on a phone screen.

However, zooming in to read forces the reader to lose context and repeatedly hunt around to find all the pieces of the page.

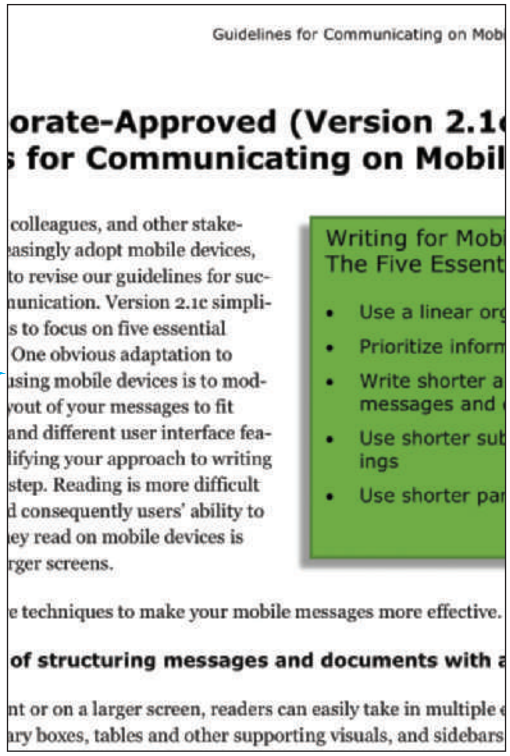


Figure 4.6b

Optimizing for mobile includes writing short headlines that get right to the point.

This introduction conveys only the information readers need in order to grasp the scope of the article.

All the key points of the documents appear here on the first screen.

Readers who want more detail can swipe down for background information on the five points.

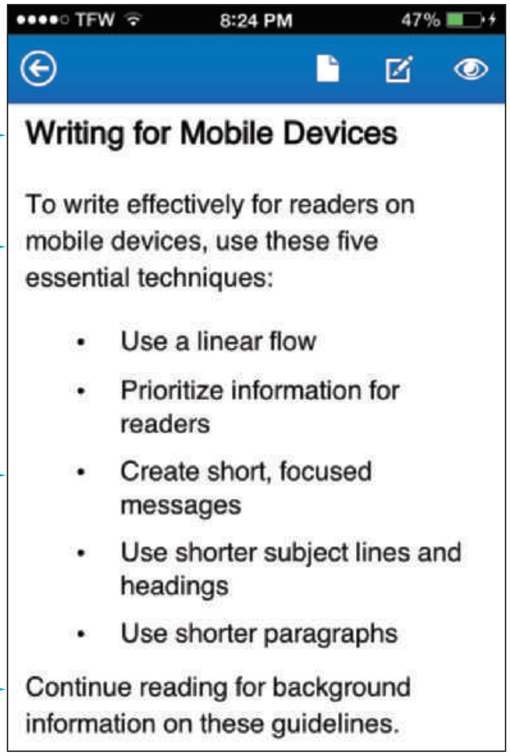


Figure 4.6c

**Figure 4.6 Writing for Mobile Devices**

Messages and documents created for printed pages and full-sized screen can be difficult and frustrating on mobile devices (Figures 4.6a and 4.6b). For mobile audiences, rewrite with short headlines and concise, linear content—notice how much easier Figure 4.6c is to read.

# Chapter Review and Activities

## Learning Objectives: Check Your Progress

**Objective 1: Identify the four aspects of being sensitive to audience needs when writing business messages.**

First, the "you" attitude refers to speaking and writing in terms of your audience's wishes, interests, hopes, and preferences rather than your own. Writing with this attitude is essential to effective communication because it shows your audience that you have their needs in mind, not just your own. Second, good etiquette not only indicates respect for your audience but also helps foster a more successful environment for communication by minimizing negative emotional reaction. Third, sensitive communicators understand the difference between delivering negative news and being negative. Without hiding the negative news, they look for ways to emphasize positive aspects. Fourth, being sensitive includes taking care to avoid biased language that unfairly and even unethically categorizes or stigmatizes people in ways related to gender, race, ethnicity, age, disability, or other personal characteristics.

**Objective 2: Explain how establishing your credibility and projecting your company's image are vital aspects of building strong relationships with your audience.**

Successful communication relies on a positive relationship between sender and receiver. The way audiences respond to your messages depends heavily on your credibility, which is a measure of your believability based on how reliable you are and how much trust you evoke in others. When you have established credibility with an audience, communication becomes much easier because you no longer have to spend time and energy convincing people that you are a trustworthy source of information and ideas. Project your company's desired image when communicating with external audiences. You represent your company and therefore play a vital role in helping the company build and maintain positive relationships with all stakeholders.

**Objective 3: Explain how to achieve a tone that is conversational but businesslike, explain the value of using plain language, and define active and passive voice.**

To achieve a tone that is conversational but still businesslike, avoid obsolete and pompous language, avoid preaching and bragging, be careful with intimacy (sharing personal details or adopting an overly casual tone), and be careful with humor. Plain language is a way of presenting information in a simple, unadorned style so that your audience can easily grasp your meaning. By writing and speaking in plain terms, you demonstrate the "you" attitude and show respect for your audience. In the active voice, the subject performs the action and the object receives the action. In the passive voice, the subject receives the action. The passive voice combines the helping verb *to be* with a form of the verb that is usually in the past tense.

**Objective 4: Describe how to select words that are not only correct but also effective.**

Selecting the correct and most effective words involves balancing abstract and concrete words, choosing powerful and familiar words, avoiding clichés, using buzzwords carefully, and using jargon carefully.

**Objective 5: Define the four types of sentences, and explain how sentence style affects emphasis within a message.**

The four types of sentences are *simple* (one main clause), *compound* (two main clauses that express independent but related ideas of equal importance), *complex* (one main clause and one subordinate clause of lesser importance), and *compound-complex* (two main clauses, at least one of which contains a subordinate clause). Sentence style affects emphasis by playing up or playing down specific parts of a sentence. To emphasize a certain point, you can place it at the end of the sentence or make it the subject of the sentence. To deemphasize a point, put it in the middle of the sentence.

**Objective 6: Define the three key elements of a paragraph, and list five ways to develop coherent paragraphs.**

The three key elements of a paragraph are a topic sentence that identifies the subject of the paragraph, support sentences that develop the topic and provide examples and evidence, and transitional words and phrases that help readers connect one thought to the next. Five ways to develop coherent paragraphs are illustration, comparison or contrast, cause and effect, classification, and problem and solution.

**Objective 7: List five techniques for writing effective messages for mobile readers.**

Five techniques for writing effective messages for mobile readers are using a linear organization so readers don't have to jump around the screen to find important message elements; prioritizing information and deliver the most important information first; writing short, focused messages; using short subject lines and headings; and using short paragraphs.

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Go to **mybcommlab.com** to complete the problems marked with this icon ✪.

## Test Your Knowledge

To review chapter content related to each question, refer to the indicated Learning Objective.

**4-1.** ✪ Why is the "you" attitude important in business communication? [LO-1]

**4-2.** Which characteristics help you establish credibility with your audiences? [LO-2]

**4-3.** How does an abstract word differ from a concrete word? [LO-4]

**4-4.** How can you use sentence style to emphasize key thoughts? [LO-5]

**4-5.** In what ways can transitions be established? [LO-6]

## Apply Your Knowledge

To review chapter content related to each question, refer to the indicated Learning Objective.

**4-6.** When composing business messages, how can you communicate with an authentic voice and project your company's image at the same time? [LO-2]

**4-7.** Should you bother using transitions if the logical sequence of your message is already obvious? Why or why not? [LO-6]

**4-8.** Why can it be difficult to use the indirect approach for a complex message that will be read on mobile devices? [LO-7]

## Practice Your Skills

### Exercises for Perfecting Your Writing

To review chapter content related to each set of exercises, refer to the indicated Learning Objective.

**The "You" Attitude:** Rewrite the following sentences to reflect your audience's viewpoint. [LO-1]

**4-9.** We request that you use the order form supplied in the back of our catalog.

**4-10.** We insist that you always bring your credit card to the store.

**4-11.** We want to get rid of all our 25-inch monitors to make room in our warehouse for the 30-inch screens. Thus we are offering a 25 percent discount on all sales this week.

**4-12.** As requested, we are sending the refund for $25.

**Emphasizing the Positive:** Revise these sentences to be positive rather than negative. [LO-1]

**4-13.** Don't clutter your desk with files and papers when you leave work for the day.

**4-14.** We don't make refunds on returned merchandise that is soiled.

**4-15.** You should have realized that waterbeds will freeze in unheated houses during winter. Therefore, our guarantee does not cover the valve damage and you must pay the $9.50 valve-replacement fee (plus postage).

**Emphasizing the Positive:** Revise the following sentences to replace unflattering terms (in italics) with euphemisms. [LO-1]

**4-16.** The new boss is __________ (*stubborn*) when it comes to doing things by the book.

**4-17.** When you say we've doubled our profit level, you are __________ (*wrong*).

**4-18.** Just be careful not to make any __________ (*stupid*) choices this week.

**4-19.** Jim Riley is __________ (*incompetent*) for that kind of promotion.

**Courteous Communication:** Revise the following sentences to make them more courteous. [LO-1]

**4-20.** You claim that you mailed your check last Thursday, but we have not received it.

**4-21.** It is not our policy to exchange sale items, especially after they have been worn.

**4-22.** You neglected to sign the enclosed contract.

**4-23.** It is imperative that he abides by the rules of the firm.

**Bias-Free Language:** Rewrite each of the following sentences to eliminate bias. [LO-1]

**4-24.** A pilot must have the ability to stay calm under pressure, and then he must be trained to cope with any problem that arises.

**4-25.** Candidate Renata Parsons, married and the mother of a teenager, will attend the debate.

**4-26.** So impressive is her résumé that Mrs. Sheffield immediately hired her for the post of vice president.

**Message Composition: Selecting Words:** In the following sentences, replace vague phrases (underlined) with concrete phrases. Make up any details you might need. [LO-4]

**4-27.** We will be opening our new facility <u>sometime this spring</u>.

**4-28.** He <u>made tremendous progress</u> in the new department to which he was assigned.

**4-29.** The new production line has been operating with <u>increased efficiency</u> on every run.

**4-30.** The client <u>kept the agency on its toes</u>, demanding creativity and innovation.

**Message Composition: Selecting Words:** In the following sentences, replace weak terms (in italics) with words that are stronger: [LO-4]

**4-31.** The two reporters __________ (*ran after*) every lead enthusiastically.

**4-32.** The __________ (*bright*) colors in that ad are keeping customers from seeing what we have to sell.

**4-33.** Health costs __________ (*suddenly rise*) when management forgets to emphasize safety issues.

**4-34.** Prices of all essential commodities have __________ (*climbed very high*) ever since state subsidies were revoked.

**Message Composition: Selecting Words:** Rewrite these sentences to replace the clichés with fresh, personal expressions. [LO-4]

**4-35.** Being a jack-of-all-trades, Dave worked well in his new selling job.

**4-36.** Moving Leslie into the accounting department, where she was literally a fish out of water, was like putting a square peg into a round hole, if you get my drift.

**4-37.** It's a dog-eat-dog world out there in the rat race of the asphalt jungle.

**Message Composition: Selecting Words:** In the following sentences, replace long, complicated words with short, simple ones. [LO-4]

**4-38.** Management __________ (*inaugurated*) the recycling policy six months ago.

**4-39.** You can convey the same meaning without __________ (*utilizing*) the same words.

**4-40.** You'll never be promoted unless you __________ (*endeavor*) to be more patient.

**4-41.** I have to wait until payday to __________ (*ascertain*) whether I got the raise.

**4-42.** High attrition was a result of the new front-line sales manager's __________ (*abrasive*) behavior.

**Message Composition: Selecting Words:** Rewrite the following sentences, replacing obsolete phrases with up-to-date versions. Write *none* if you think there is no appropriate substitute. [LO-4]

**4-43.** I have completed the form and returned it to my insurance company, as per your instructions.

**4-44.** Attached herewith is a copy of our new contract for your records.

**4-45.** Please be advised that your account with National Bank has been compromised, and we advise you to close it as soon as possible.

**Message Composition: Creating Sentences:** Rewrite the following sentences so that they are active rather than passive. [LO-5]

**4-46.** The raw data are submitted to the data-processing division by the sales representative each Friday.

**4-47.** High profits are publicized by management.

**4-48.** Our computers are serviced by the Santee Company.

**4-49.** The employees were represented by Janet Hogan.

**Message Organization: Transitions:** Add transitions to the following sentences to improve the flow of ideas. (Note: You may need to eliminate or add some words to smooth out the sentences.) [LO-6]

**4-50.** Facing some of the toughest competitors in the world, Harley-Davidson had to make some changes. The company introduced new products. Harley's management team set out to rebuild the company's production process. New products were coming to market and the company was turning a profit. Harley's quality standards were not on par with those of its foreign competitors. Harley's costs were still among the highest in the industry. Harley made a U-turn and restructured the company's organizational structure. Harley's efforts have paid off.

**4-51.** Whether you're indulging in a doughnut in New York or California, Krispy Kreme wants you to enjoy the same delicious taste with every bite. The company maintains consistent product quality by carefully controlling every step of the production process. Krispy Kreme tests all raw ingredients against established quality standards. Every delivery of wheat flour is sampled and measured for its moisture content and protein levels. Krispy Kreme blends the ingredients. Krispy Kreme tests the doughnut mix for quality. Krispy Kreme delivers the mix to its stores. Krispy Kreme knows that it takes more than a quality mix to produce perfect doughnuts all the time. The company supplies its stores with everything they need to produce premium doughnuts—mix, icings, fillings, equipment—you name it.

## Activities

Each activity is labeled according to the primary skill or skills you will need to use. To review relevant chapter content, you can refer to the indicated Learning Objective. In some instances, supporting information will be found in another chapter, as indicated.

**4-52. Writing: Establishing Your Credibility; Microblogging Skills [LO-2], Chapter 6** Search LinkedIn for the profile of an expert in any industry or profession. Now imagine that you are going to introduce this person as a speaker at a convention. You will make an in-person introduction at the time of the speech, but you decide to introduce him or her the day before on Twitter. Write four tweets: one that introduces the expert and three that cover three key supporting points that will enhance the speaker's credibility in the minds of potential listeners. Make up any information you need to complete this assignment, then email the text of your proposed tweets to your instructor.

**4-53. Writing: Creating a Businesslike Tone; Media Skills: Email [LO-3]** Read the following email message and then (1) analyze the strengths and weaknesses of each sentence and (2) revise the message so that it follows this chapter's guidelines. The message was written by a senior executive of a stationary manufacturing company to the editor of a business magazine in the hopes of convincing her to publish an article about the company. The company prides itself on being the sole stationary manufacturer to market its products internationally through marquee outlets.

Kreative Toolz, our company, is a leading stationary company, specializing in a host of products to suit any organization's needs. We pride ourselves on being the only indigenous (Korean) manufacturing company to take its stationary products overseas. We have a state-of-the-art manufacturing facility that produces a vast range of products such as crayons, water colors, highlighters, pens, pencils, staplers and pins, punches, and spiral-bound folders. With the establishment of marquee outlets internationally, our brands have carved out a niche for themselves amidst a slew of global brands. The company is currently spearheaded by Thomas Sayers, our CEO, whose business acumen and marketing genius have resulted in the company growing profitably by 25 percent every year. I am sure that your readers would be delighted to know about our company and its products, and hope that you will feature us in a corporate story in your widely read and esteemed publication.

**4-54. Writing: Using Plain Language; Media Skills: Blogging [LO-3]** Visit the Securities and Exchange Commission's website and locate *A Plain English Handbook*. In one or two sentences, summarize what the SEC means by the phrase *plain English*. Next, download the document "Mutual Funds – A Guide for Investors" (also from the SEC website). Does this information follow the SEC's plain English guidelines? Cite several examples that support your assessment. Post your analysis on your class blog.

**4-55. Writing: Creating Effective Sentences; Media Skills: Social Networking [LO-4]** If you are interested in business, chances are you've had an idea or two for starting a company. If you haven't yet, go ahead and dream up an idea now. Make it something you are passionate about, something you could really throw yourself into. Now write a four-sentence summary that could appear on the Info tab on a Facebook profile. Make sure the first sentence is a solid topic sentence, and make sure the next three sentences offer relevant evidence and examples. Feel free to make up any details you need. Email your summary to your instructor or post it on your class blog.

**4-56. Writing: Crafting Unified, Coherent Paragraphs; Media Skills: Email [LO-5]** Suppose that end-of-term frustrations have produced this email message to Professor Anne Brewer from a student who believes he should have received a B in his accounting class. If this message were recast into three or four clear sentences, the teacher might be more receptive to the student's argument. Rewrite the message to show how you would improve it:

I think that I was unfairly awarded a C in your accounting class this term, and I am asking you to change the grade to a B. It was a difficult term. I don't get any money from home, and I have to work mornings at the Pancake House (as a cook), so I had to rush to make your class, and those two times that I missed class were because they wouldn't let me off work because of special events at the Pancake House (unlike some other students who just take off when they choose). On the midterm examination, I originally got a 75 percent, but you said in class that there were two different ways to answer the third question and that you would change the grades of students who used the "optimal cost" method and had been counted off 6 points for doing this. I don't think that you took this into account, because I got 80 percent on the final, which is clearly a B. Anyway, whatever you decide, I just want to tell you that I really enjoyed this class, and I thank you for making accounting so interesting.

**4-57. Media Skills: Writing for Mobile Devices** [LO-7] Find an interesting website article on any business topic. Write a three-paragraph summary that would be easy to read on a phone screen.

# Expand Your Skills

## Critique the Professionals

Locate an example of professional communication from a reputable online source. Choose a paragraph that has at least three sentences. Evaluate the effectiveness of this paragraph at three levels, starting with the paragraph structure. Is the paragraph unified and cohesive? Does it have a clear topic sentence and sufficient support to clarify and expand on that topic? Second, evaluate each sentence. Are the sentences easy to read and easy to understand? Did the writer vary the types and lengths of sentences used to produce a smooth flow and rhythm? Is the most important idea presented prominently in each sentence? Third, evaluate at least six word choices. Did the writer use these words correctly and effectively? Using whatever medium your instructor requests, write a brief analysis of the piece (no more than one page), citing specific elements from the piece and support from the chapter.

## Sharpen Your Career Skills Online

Bovée and Thill's Business Communication Web Search, at **http://websearch.businesscommunicationnetwork.com**, is a unique research tool designed specifically for business communication research. Use the Web Search function to find a website, video, PDF document, podcast, or presentation that offers advice on adapting to your audience or composing business messages. Write a brief email message to your instructor or a post for your class blog, describing the item that you found and summarizing the career skills information you learned from it.

# Improve Your Grammar, Mechanics, and Usage

You can download the text of this assignment from **http://real-timeupdates.com/bce7**; click on Student Assignments and then click on Chapter 4. Improve Your Grammar, Mechanics, and Usage.

## Level 1: Self-Assessment—Adjectives

Review Section 1.4 in the Handbook of Grammar, Mechanics, and Usage and then complete the following items.

For the following items, indicate the appropriate form of the adjective that appears in parentheses.

**4-58.** Of the two products, this one has the ____________ (great) potential.

**4-59.** The ____________ (perfect) solution is d.

**4-60.** Here is the ____________ (interesting) of all the ideas I have heard so far.

**4-61.** Our service is ____________ (good) than theirs.

**4-62.** The ____________ (hard) part of my job is firing people.

For the following items, insert hyphens where required.

**4-63.** A highly placed source revealed Dotson's last ditch efforts to cover up the mistake.

**4-64.** Please send an extra large dust cover for my photocopier.

**4-65.** A top secret document was taken from the president's office last night.

**4-66.** A 30 year old person should know better.

**4-67.** If I write a large scale report, I want to know that it will be read by upper level management.

For the following items, insert required commas, where needed, between adjectives.

**4-68.** The two companies are engaged in an all-out no-holds-barred struggle for dominance.

**4-69.** A tiny metal shaving is responsible for the problem.

**4-70.** She came to the office with a bruised swollen knee.

**4-71.** A chipped cracked sheet of glass is useless to us.

**4-72.** You'll receive our usual cheerful prompt service.

## Level 2: Workplace Applications

The following items may contain errors in grammar, capitalization, punctuation, abbreviation, number style, word division, and vocabulary. Rewrite each sentence, correcting all errors. If a sentence has no errors, write "Correct" for that number.

**4-73.** Its time that you learned the skills one needs to work with suppliers and vendors to get what you want and need.

**4-74.** Easy flexible wireless calling plans start for as little as $19 dollars a month.

**4-75.** There's several criteria used to select customer's to receive this offer.

**4-76.** PetFood Warehouse officially became PETsMART, Jim left the co. due to health reasons.

**4-77.** First quarter sales gains are evident in both the grocery store sector (up 1.03%) and the restaurant sector (up 3.17 per cent) according to Food Institute estimates.

**4-78.** Whatever your challenge, learning stronger "negotiating" tactics and strategies will improve the way people work and the results that comes from their efforts.

**4-79.** To meet the increasing demand for Penta bottled-drinking-water, production capacity is being expanded by Bio-Hydration Research Lab by 80 percent.

**4-80.** Seminars begin at 9 A.M. and wrap up at 4:00 P.M.

**4-81.** Temple, Texas-based McLane Co. a subsidiary of Walmart has bought a facility in Northfield, Minn that it will use to distribute products to customers such as convenience stores, stores that sell items at a discount, and mass merchants.

**4-82.** The British Retail Consortium are releasing the 3rd edition of its Technical Standards on Apr. 22, reported The New York Times.

**4-83.** The reason SkillPath is the fastest growing training company in the world is because of our commitment to providing clients with the highest-quality learning experiences possible.

**4-84.** According to professor Charles Noussair of the economics department of Purdue University, opinion surveys "Capture the respondent in the role of a voter, not in the role of a consumer".

**4-85.** The Study found that people, exposed to Purina banner ads, were almost 50 percent more likely to volunteer Purina as the first Dog Food brand that came to mind.

**4-86.** In a consent decree with the food and drug administration, E'Ola International a dietary supplement maker agreed not to sell any more products containing the drug, ephedrine.

**4-87.** Dennis Dickson is looking for a company both to make and distribute plaidberries under an exclusive license, plaidberries is blackberries that are mixed with extracts and they are used as a filling.

### Level 3: Document Critique

The following document may contain errors in grammar, capitalization, punctuation, abbreviation, number style, word division, and vocabulary. You will also find errors related to topics in this chapter. Concentrate on using the "you" attitude, emphasizing the positive, being polite, and using bias-free language as you improve this message. As your instructor indicates, photocopy this page and correct all errors using standard proofreading marks (see Appendix C) or download the document and make the corrections in your word-processing software.[18]

**Welcome! Here is your new card for your Health Savings Account (HSA)**

**Using your prepaid card makes HSAs: Fast + Easy + Automatic!!**

Step 1 Activate and Sign Your Card(s)

- You **CANNOT** use your card until you perfom these following steps: to activate, go to the websight listed on the back of your Card(s). You can also just following the instructons written on the sticker which should be attached to the front of your card.
- Your member ID No. could be one of two things: your Social Security Number or the ID number assigned by your Health Plan
- Sign the back of your card and have the other person on the account, if any, sign the other card (you should've received two cards with this letter, by the way)

Step 2 Use Your Card as You Need

However, **DO NOT ATTEMPT** to use yoru card for anything expenses other than current year medical expenses—qualified only!—for you or your dependents if you have any

The things your Card can be used for include but are not limited to such as:

- Prescriptions, but only those covered by your health plan—obviously
- Dental
- Vision and eyewear
- OTC items if covered

Step 3 Save All Receipts!! So you can use them when you do your taxes

MyBCommLab

Go to **mybcommlab.com** for the following Assisted-graded writing questions:

**4-88.** How can you demonstrate the "you" attitude if you don't know your audience personally? [LO-1]

**4-89.** What steps can you take to make abstract concepts such as opportunity feel more concrete in your messages? [LO-4]

## Endnotes

**1.** "Mobile Message Mayhem," Verne Ordman & Associates, accessed 12 March 2014, www.businesswriting.biz.
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**3.** Sherryl Kleinman, "Why Sexist Language Matters," *Qualitative Sociology* 25, no. 2 (Summer 2002): 299–304.
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**5.** Xerox website, accessed 12 March 2014, www.xerox.com; ADM website, accessed 12 March 2014, www.adm.com.
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**7.** Susan Benjamin, *Words at Work* (Reading, Mass.: Addison-Wesley, 1997), 136–137.
**8.** Plain English Campaign website, accessed 28 June 2010, www.plainenglish.co.uk.
**9.** Plain Language website; Etzkorn, "Amazingly Simple Stuff."
**10.** Susan Jaderstrom and Joanne Miller, "Active Writing," *Office Pro*, November/December 2003, 29.
**11.** Portions of this section are adapted from Courtland L. Bovée, *Techniques of Writing Business Letters, Memos, and Reports* (Sherman Oaks, Calif.: Banner Books International, 1978), 13–90.
**12.** Catherine Quinn, "Lose the Office Jargon; It May Sunset Your Career," *The Age* (Australia), 1 September 2007, www.theage.com.au.
**13.** Jakob Nielsen, "Mobile Content Is Twice as Difficult," NN/g, 28 February 2011, www.nngroup.com.
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**15.** "Mobile Message Mayhem."
**16.** "Mobile Message Mayhem."
**17.** Marieke McCloskey, "Writing Hyperlinks: Salient, Descriptive, Start with Keyword," NN/g, 9 March 2014, www.nngroup.com.
**18.** Adapted from a mailer received from Evolution Benefits, 10 January 2008. (None of the errors shown in this exercise exist in the original.)

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# 5 Completing Business Messages

## LEARNING OBJECTIVES

After studying this chapter, you will be able to

1. Discuss the value of careful revision, and describe the tasks involved in evaluating your first drafts and the work of other writers
2. List four techniques you can use to improve the readability of your messages
3. Describe the steps you can take to improve the clarity of your writing, and give four tips on making your writing more concise
4. List four principles of effective design, and explain the role of major design elements in document readability
5. Explain the importance of proofreading, and give six tips for successful proofreading
6. Discuss the most important issues to consider when distributing your messages



## Communication Matters . . .

"The message from recruitment agencies, employer surveys, and the like is familiar, loud, and clear: You must be an outstanding communicator if you want to get to the top of your profession."
—Martin Shovel, writer, speechwriter, illustrator, and cofounder of CreativityWorks

As a multitalented communication specialist who has succeeded at everything from advertising to professional illustration to script-writing, Martin Shovel has had numerous opportunities to see effective communication in action. He knows that the top professionals in every field have worked hard to hone their communication skills, and his years of experience have taught him what it takes to communicate in an engaging and persuasive manner. His number one rule: Keep it simple.[1] The secret to simplicity is careful revision—transforming a rambling, unfocused message into a lively, direct one that gets attention and spurs action.

Martin Shovel/Creativity Works Ltd.

The versatile communication specialist Martin Shovel knows that careful revision is key to the simplicity and clarity that are the hallmarks of effective messages.

# Revising Your Message: Evaluating the First Draft

1 LEARNING OBJECTIVE
Discuss the value of careful revision, and describe the tasks involved in evaluating your first drafts and the work of other writers.

This chapter covers the tasks in the third step of the three-step writing process: revising your message to achieve optimum quality and then producing, proofreading, and distributing it. After you complete your first draft, you may be tempted to breathe a sigh of relief, send the message on its way, and move on to the next project. Resist that temptation. Successful communicators recognize that the first draft is rarely as tight, clear, and compelling as it needs to be. Careful revision improves the effectiveness of your messages and sends a strong signal to your readers that you respect their time and care about their opinions.[2]

The scope of the revision task can vary somewhat, depending on the medium and the nature of your message. For informal messages to internal audiences, particularly when using short-message tools such as IM and email, the revision process is often as simple as quickly looking over your message to correct any mistakes before sending or posting it.

However, don't fall into the common trap of thinking you don't need to worry about grammar, spelling, clarity, and other fundamentals of good writing when you use digital formats. These qualities can be *especially* important with digital, particularly if these messages are the only contact your audience has with you. First, poor-quality messages create an impression of poor-quality thinking, and even minor errors can cause confusion, frustration, and costly delays. Second, assume that anything you write for digital channels will be stored forever and could be distributed far beyond your original audience. Don't join the business professionals who have seen ill-considered or poorly written messages wind up in the news media or as evidence in lawsuits or criminal cases.

For important messages, schedule time to put your draft aside for a day or two before you begin the revision process.

Particularly with important messages, try to plan your work schedule so that you can put your first draft aside for a day or two before you begin the revision process. Doing so will allow you to approach the material with a fresh eye. Then start with the "big picture," making sure that the document accomplishes your overall goals, before moving to finer points such as readability, clarity, and conciseness. Compare the before and after versions of the letter in Figures 5.1 and 5.2 on the following pages for examples of how careful revision makes a message more effective and easier to read.

## EVALUATING YOUR CONTENT, ORGANIZATION, AND TONE

When you begin the revision process, focus on content, organization, and tone. Today's time-pressed readers want messages that convey important content clearly and quickly.[3] To evaluate the content of your message, make sure it is accurate, relevant to the audience's needs, and complete.

When you are satisfied with the basic content of your message, review its organization by asking yourself these questions:

- Are all your points covered in the most logical and convincing order?
- Do the most important ideas receive the most space and greatest emphasis?
- Are any points repeated unnecessarily?
- Are details grouped together logically, or are some still scattered through the document?

Next, consider whether you have achieved the right tone for your audience. Is your writing formal enough to meet the audience's expectations without being too formal or academic? Is it too casual for a serious subject? Finally, spend a few extra moments on the beginning and end of your message; these sections usually have the greatest impact on the audience.

## EVALUATING, EDITING, AND REVISING THE WORK OF OTHER WRITERS

When you evaluate, edit, or revise someone else's work, remember that your job is to help that person succeed, not to impose your own style.

At many points in your career, you will be asked to evaluate, edit, or revise the work of others. Before you dive into someone else's work, recognize the dual responsibility that you have. First, unless you've specifically been asked to rewrite something in your own style, keep in mind that your job is to help the other writer succeed at his or her task, not to impose your writing style. Second, make sure you understand the writer's intent before

Delauny Music
56 Commerce Circle • Davenport, IA 52806
(563) 555-4001 • delaunymusic.net

June 21, 2015

Need 7 blank lines here

Ms. Claudia Banks
122 River Heights Drive
Bettendorf, IA 52722

Dear Ms. Banks:

On behalf of everyone at Delauny Music, it is my pleasure to thank you for your recent purchase of a Yamaha CG1 grand piano. The Cg1 carries more than a century of Yamaha's heritage in design and production of world-class musical instruments and ~~you can bet it~~ will give you many years of playing and listening pleasure. Our commitment to your satisfaction doesn't stop with your purchase, however. ~~Much to the contrary, it continues for as long as you own your piano, which we hope, of course, is for as long as you live.~~ As a vital first step, please remember to call us ~~your local Yamaha dealer,~~ sometime within three to eight months after your piano was delivered to take advantage of the ~~free~~ Yamaha Servicebond℠ Assurance Program. This free service program includes a thorough evaluation and ~~adjusting~~ adjustment of the instrument after you've had some time to play your piano and your piano has had time to adapt to its environment.

The two circled sentences say essentially the same thing, so this edit combines them into one sentence.

The phrase *you can bet* is too informal for this message.

The sentence beginning with "Much to the contrary . . . " is awkward and unnecessary.

Changing *adjusting* to *adjustment* makes it parallel with *evaluation.*

In addition to this ~~vital~~ important service appointment, a regular program of tuning is ~~absolutely~~ essential to ensure ~~its~~ your piano's impeccable performance. Our piano specialists recommend four tunings during the first year and two tunings every year thereafter ~~that~~. As your local Yamaha dealer, we are ideally positioned to provide you with optimum service for both regular tuning and any maintenance or repair needs you may have. ~~over the years.~~

Replacing *its* with *your piano's* avoids any confusion about which noun that *it* is supposed to replace.

This edit inserts a missing word (*dealer*).

~~All of us at Delauny Music~~ thank you for your recent purchase ~~and~~. We wish you many ~~many~~ years of satisfaction with your new Yamaha CG1 grand piano.

This group of edits removes unnecessary words in several places.

Sincerely,
~~Respectfully yours in beautiful music,~~

The simple complimentary close replaces a close that was stylistically over the top.

Madeline Delauny
Owner

tjr

**Common Proofreading Symbols (see page 465 for more)**

| | |
|---|---|
| ~~strikethrough~~ | Delete text |
| ⅋ | Delete individual character or a circled block of text |
| ^ | Insert text (text to insert is written above) |
| ⊙ | Insert period |
| ^, | Insert comma |
| ⌐ | Start new line |
| ¶ | Start new paragraph |
| ≡ | Capitalize |

**Figure 5.1 Improving a Customer Letter Through Careful Revision**
Careful revision makes this draft shorter, clearer, and more focused. The proofreading symbols you see here are still widely used whenever printed documents are edited and revised; you can find a complete list of symbols in Appendix C. Note that many business documents are now "marked up" using such technological tools as revision marks in Microsoft Word and comments in Adobe Acrobat. No matter what the medium, however, careful revision is key to more effective messages.

Delauny Music
56 Commerce Circle • Davenport, IA 52806
(563) 555-4001 • delaunymusic.net

June 21, 2015

Ms. Claudia Banks
122 River Heights Drive
Bettendorf, IA 52722

Dear Ms. Banks:

Thank you for your recent purchase. We wish you many years of satisfaction with your new Yamaha CG1 grand piano. The CG1 carries more than a century of Yamaha's heritage in design and production of world-class musical instruments and will give you many years of playing and listening pleasure.

Our commitment to your satisfaction doesn't stop with your purchase, however. As a vital first step, please remember to call us sometime within three to eight months after your piano was delivered to take advantage of the Yamaha Servicebond℠ Assurance Program. This free service program includes a thorough evaluation and adjustment of the instrument after you've had some time to play your piano and your piano has had time to adapt to its environment.

In addition to this important service appointment, a regular program of tuning is essential to ensure your piano's impeccable performance. Our piano specialists recommend four tunings during the first year and two tunings every year thereafter. As your local Yamaha dealer, we are ideally positioned to provide you with optimum service for both regular tuning and any maintenance or repair needs you may have.

Sincerely,

Madeline Delauny

Madeline Delauny
Owner

tjr

The letter is now properly formatted.

The content is now organized in three coherent paragraphs, each with a distinct message.

The tone is friendly and engaging without being flowery.

MyBCommLab Apply Figure 5.2's key concepts by going to **mybcommlab.com**

**Figure 5.2 Professional Business Letter**
Here is the revised and finished version of the edited letter from Figure 5.1. Note that the *block format* used here is just one of several layout options; Appendix A also describes the *modified block format* and the *simplified format*.

you begin suggesting or making changes. With those thoughts in mind, ask yourself the following questions as you evaluate someone else's writing:

- What is the purpose of this document or message?
- Who is the target audience?
- What information does the audience need?
- Are there any special circumstances or sensitive issues that the writer had to consider (or should have considered)?
- Does the document provide this information in a well-organized way?
- Does the writing demonstrate the "you" attitude toward the audience?
- Is the tone of the writing appropriate for the audience and the situation?
- Can the readability be improved?
- Is the writing clear? If not, how can it be improved?
- Is the writing as concise as it could be?
- Does the page or screen design support the intended message?

You can read more about using these skills in the context of wiki writing in Chapter 6.

# Revising to Improve Readability

After confirming the content, organization, and tone of your message, make a second pass to improve *readability*. Most professionals are inundated with more reading material than they can ever hope to consume, and they'll appreciate your efforts to make your documents easier to read—and easier to skim for the highlights when they don't have time to read in depth. You'll benefit from this effort, too: If you earn a reputation for creating well-crafted documents that respect the audience's time, people will pay more attention to your work.

2 LEARNING OBJECTIVE
List four techniques you can use to improve the readability of your messages.

Four powerful techniques for improving readability are varying sentence length, using shorter paragraphs, replacing narrative with lists, and adding effective headings and subheadings.

## VARYING SENTENCE LENGTH

Varying sentence length is a good way to maintain reader interest and control the emphasis given to major and minor points. Look for ways to combine a mixture of sentences that are short (up to 15 words or so), medium (15–25 words), and long (more than 25 words). Each sentence length has advantages. Short sentences can be processed quickly and are easier for nonnative speakers and translators to interpret. Medium-length sentences are useful for showing the relationships among ideas. Long sentences are often the best way to convey complex ideas, to list a number of related points, or to summarize or preview information.

To keep readers' interest, look for ways to combine a variety of short, medium, and long sentences.

Of course, each sentence length has disadvantages as well. Too many short sentences in a row can make your writing feel choppy and disconnected. Medium sentences can lack the punch of short sentences and the informative power of longer sentences. Long sentences are usually harder to understand than short sentences because they are packed with information; they also harder to skim when readers are just looking for key points in a hurry.

## KEEPING YOUR PARAGRAPHS SHORT

Large blocks of text can be visually daunting, particularly on screen, so keep your paragraphs as short as possible. Unless you break up your thoughts somehow, you'll end up with lengthy paragraphs that will intimidate even the most dedicated reader. Short paragraphs, roughly 100 words or fewer (this paragraph has 78 words), are easier to read than long ones, and they make your writing look inviting. You can also emphasize ideas by isolating them in short, forceful paragraphs.

Short paragraphs have the major advantage of being easy to read.

However, don't go overboard with short paragraphs at the expense of maintaining a smooth and clear flow of information. In particular, use one-sentence paragraphs only occasionally and only for emphasis. Also, if you need to divide a subject into several pieces in order to keep paragraphs short, use transitions to help your readers keep the ideas connected.

## USING LISTS AND BULLETS TO CLARIFY AND EMPHASIZE

In some instances, a list can be more effective than conventional sentences and paragraphs. Lists can show the sequence of your ideas, heighten their impact visually, and increase the likelihood that readers will find your key points. In addition, lists help simplify complex subjects, highlight the main points, enable skimming, and give readers a visual break. Compare these two approaches to the same information:

Lists are effective tools for highlighting and simplifying material.

### Narrative

Owning your own business has many potential advantages. One is the opportunity to pursue your own personal passion. Another advantage is the satisfaction of working for yourself. As a sole proprietor, you also have the advantage of privacy because you do not have to reveal your financial information or plans to anyone.

### List

Owning your own business has three advantages:

- Opportunity to pursue personal passion
- Satisfaction of working for yourself
- Financial privacy

When creating a list, you can separate items with numbers, letters, or *bullets* (any kind of graphical element that precedes each item). Bullets are generally preferred over numbers, unless the list is in some logical sequence or ranking or specific list items will be referred to later. Make your lists easy to read by making all the items parallel (see "Impose parallelism" bullet below) and keeping individual items as short as possible.[4] Also, be sure to introduce your lists clearly so that people know what they're about to read.

### ADDING HEADINGS AND SUBHEADINGS

Use headings to grab the reader's attention and organize material into short sections.

A **heading** is a brief title that tells readers about the content of the section that follows. **Subheadings** indicate subsections within a major section; complex documents may have several levels of subheadings. Headings and subheadings help in three important ways: They show readers at a glance how the material is organized, they call attention to important points, and they highlight connections and transitions between ideas.

Informative headings are generally more helpful than descriptive ones.

**Descriptive headings**, such as "Cost Considerations," simply identify a topic without suggesting anything more. **Informative headings**, such as "Redesigning Material Flow to Cut Production Costs," give the reader some context and may point toward any conclusions or recommendations that you offer in the section. Well-written informative headings are self-contained, which means readers can skim just the headings and subheadings and understand them without reading the rest of the document. Whatever types of headings you choose, keep them brief and grammatically parallel.

## Editing for Clarity and Conciseness

3 LEARNING OBJECTIVE
Describe the steps you can take to improve the clarity of your writing, and give four tips on making your writing more concise.

After you've reviewed and revised your message for readability, your next step is to make sure your message is as clear and as concise as possible.

### EDITING FOR CLARITY

Clarity is essential to getting your message across accurately and efficiently.

Make sure that every sentence conveys the meaning you intend and that readers can extract your intended meaning without needing to read the sentence more than once. To ensure clarity, look closely at your paragraph organization, sentence structure, and word choices. Can readers make sense of the related sentences in a paragraph? Is the meaning of each sentence easy to grasp? Is every word clear and unambiguous (meaning it doesn't have any risk of being interpreted in more than one way)? See Table 5.1 for examples of the following tips:

Hedging is appropriate when you can't be absolutely sure of a statement, but excessive hedging undermines your authority.

When you use parallel grammatical patterns to express two or more ideas, you show that they are comparable thoughts.

- **Break up overly long sentences.** If you find yourself stuck in a long sentence, you're probably trying to make the sentence do more than it can reasonably do, such as expressing two dissimilar thoughts or peppering the reader with too many pieces of supporting evidence at once. (Did you notice how difficult this long sentence was to read?)
- **Rewrite hedging sentences.** *Hedging* means pulling back from making an absolutely certain, definitive statement about a topic. Granted, sometimes you have to write *may* or *seems* to avoid stating a judgment as a fact. However, when you hedge too often or without good reason, you come across as being unsure of what you're saying.
- **Impose parallelism.** Making your writing *parallel* means expressing two or more similar ideas using the same grammatical structure. Doing so helps your audience understand that the ideas are related, are of similar importance, and are on the same level of generality. Parallel patterns are also easier to read. You can impose parallelism by repeating a pattern in words, phrases, clauses, or entire sentences.
- **Correct dangling modifiers.** Sometimes a modifier is not just an adjective or an adverb but an entire phrase modifying a noun or a verb. Be careful not to leave this type of modifier *dangling*, with no connection to the subject of the sentence.
- **Reword long noun sequences.** When multiple nouns are strung together as modifiers, the resulting sentence can be hard to read. See if a single well-chosen word will do the

TABLE 5.1 **Revising for Clarity**

| Issues to Review | Ineffective | Effective |
|---|---|---|
| **Overly Long Sentences** | | |
| Taking compound sentences too far | The magazine will be published January 1, and I'd better meet the deadline if I want my article included because we want the article to appear before the trade show. | The magazine will be published January 1. I'd better meet the deadline because we want the article to appear before the trade show. |
| **Hedging Sentences** | | |
| Overqualifying sentences | I believe that Mr. Johnson's employment record seems to show that he may be capable of handling the position. | Mr. Johnson's employment record shows that he is capable of handling the position. |
| **Unparallel Sentences** | | |
| Using dissimilar construction for similar ideas | Mr. Simms had been drenched with rain, bombarded with telephone calls, and his boss shouted at him. | Mr. Sims had been drenched with rain, bombarded with telephone calls, and shouted at by his boss. |
| | To waste time and missing deadlines are bad habits. | Wasting time and missing deadlines are bad habits. |
| **Dangling Modifiers** | | |
| Placing modifiers close to the wrong nouns and verbs | Walking to the office, a red sports car passed her. [suggests that the car was walking to the office] | A red sports car passed her while she was walking to the office. |
| | Reduced by 25 percent, Europe had its lowest semiconductor output in a decade. [suggests that Europe shrank by 25 percent] | Europe reduced semiconductor output by 25 percent, its lowest output in a decade. |
| **Long Noun Sequences** | | |
| Stringing too many nouns together | The window sash installation company will give us an estimate on Friday. | The company that installs window sashes will give us an estimate on Friday. |
| **Camouflaged Verbs** | | |
| Changing verbs into nouns | The manager undertook implementation of the rules. | The manager implemented the rules. |
| | Verification of the shipments occurs weekly. | We verify shipments weekly. |
| | reach a conclusion about | conclude |
| | give consideration to | consider |
| **Sentence Structure** | | |
| Separating subject and predicate | A 10% decline in market share, which resulted from quality problems and an aggressive sales campaign by Armitage, the market leader in the Northeast, was the major problem in 2010. | The major problem in 2010 was a 10% loss of market share, which resulted from quality problems and an aggressive sales campaign by Armitage, the market leader in the Northeast. |
| Separating adjectives, adverbs, or prepositional phrases from the words they modify | Our antique desk lends an air of strength and substance with thick legs and large drawers. | With its thick legs and large drawers, our antique desk lends an air of strength and substance. |
| **Awkward References** | The Law Office and the Accounting Office distribute computer supplies for legal secretaries and beginning accountants, respectively. | The Law Office distributes computer supplies for legal secretaries; the Accounting Office distributes those for beginning accountants. |

job. If the nouns are all necessary, consider moving one or more to a modifying phrase, as shown in Table 5.1.

- **Replace camouflaged verbs.** Watch for words that end in *ion*, *tion*, *ing*, *ment*, *ant*, *ent*, *ence*, *ance*, and *ency*. These endings often change verbs into nouns and adjectives, requiring you to add a verb to get your point across.
- **Clarify sentence structure.** Keep the subject and predicate of a sentence as close together as possible. Similarly, adjectives, adverbs, and prepositional phrases usually make the most sense when they're placed as close as possible to the words they modify.
- **Clarify awkward references.** Try to avoid vague references such as *the above-mentioned*, *as mentioned above*, *the aforementioned*, *the former*, *the latter*, and *respectively*. Use a specific pointer such as "as described in the second paragraph on page 66."

Subject and predicate should be placed as close together as possible, as should modifiers and the words they modify.

### EDITING FOR CONCISENESS

Make your documents tighter by removing unnecessary words, phrases, and sentences.

Many of the changes you make to improve clarity also shorten your message by removing unnecessary words. The next step is to examine the text with the specific goal of reducing the number of words. Readers appreciate conciseness and are more likely to read your documents if you have a reputation for efficient writing. See Table 5.2 for examples of the following tips:

- **Delete unnecessary words and phrases.** To test whether a word or phrase is essential, try the sentence without it. If the meaning doesn't change, leave it out.
- **Replace long words and phrases.** Short words and phrases are generally more vivid and easier to read than long ones.
- **Eliminate redundancies.** In some word combinations, the words say the same thing. For instance, "visible to the eye" is redundant because *visible* is enough without further clarification; "to the eye" adds nothing.
- **Recast "It is/There are" starters.** If you start a sentence with an indefinite pronoun such as *it* or *there*, odds are the sentence could be shorter and more active. For instance, "We believe . . ." is a stronger opening than "It is believed that. . . ."

As you make all these improvements, concentrate on how each word contributes to an effective sentence and on how each sentence helps to develop a coherent paragraph.

## Producing Your Message

4 LEARNING OBJECTIVE
List four principles of effective design, and explain the role of major design elements in document readability.

Now it's time to put your hard work on display. The *production quality* of your message—the total effect of page or screen design, graphical elements, typography, and so on—plays an important role in its effectiveness. A polished, inviting design not only makes your document easier to read but also conveys a sense of professionalism and importance.[5]

### DESIGNING FOR READABILITY

The quality of your document design, both on paper and on screen, affects readability and audience perceptions.

Design affects readability in two important ways. First, depending on how they are used, design elements can increase or decrease the effectiveness of your message. Thoughtful, reader-focused design makes messages easier to read, whereas poorly chosen design elements can act as barriers that impede communication. Second, the visual design sends a nonverbal message to your readers, influencing their perceptions of the communication before they read a single word (see Figure 5.3 on page 160).

To achieve an effective design, pay careful attention to the following design elements:

Good design enhances the readability of your material.

For effective design, pay attention to
- Consistency
- Balance
- Restraint
- Detail

- **Consistency.** Throughout each message, be consistent in your use of margins, typeface, type size, spacing, color, lines, and position. In most cases, you'll want to be consistent from message to message as well; that way, audiences who receive multiple messages from you recognize your documents and know what to expect. Style sheets and themes can be a big help here.
- **Balance.** Balance is an important but sometimes subjective design issue. One document may have a formal, rigid design in which the various elements are placed in a grid pattern, whereas another may have a less formal design in which elements flow more freely across the page—and both could be in balance. Like the tone of your language, visual balance can be too formal, just right, or too informal for a given message.
- **Restraint.** Strive for simplicity. Don't clutter your message with too many design elements, too many colors, or too many decorative touches.
- **Detail.** Pay attention to details that affect your design and thus your message. For instance, extremely wide columns of text can be difficult to read; in many cases a better solution is to split the text into two narrower columns.

Even without special training in graphic design, you can make your printed messages more effective by understanding the use of some key design elements: white space, margins and line justification, typefaces, and type styles.

MOBILE APPS
Genius Scan lets you scan documents with your phone and create PDFs on the go.

TABLE 5.2 **Revising for Conciseness**

| Issues to Review | Ineffective | Effective |
|---|---|---|
| **Unnecessary Words and Phrases** | | |
| Using wordy phrases | for the sum of | for |
| | in the event that | if |
| | prior to the start of | before |
| | in the near future | soon |
| | at this point in time | now |
| | due to the fact that | because |
| | in view of the fact that | because |
| | until such time as | when |
| | with reference to | about |
| Using too many relative pronouns | Cars that are sold after January will not have a six-month warranty. | Cars sold after January will not have a six-month warranty. |
| | Employees who are driving to work should park in the underground garage. | Employees driving to work should park in the underground garage. |
| | | OR |
| | | Employees should park in the underground garage. |
| Using too few relative pronouns | The project manager told the engineers last week the specifications were changed. | The project manager told the engineers last week that the specifications were changed. |
| | | The project manager told the engineers that last week the specifications were changed. |
| **Long Words and Phrases** | | |
| Using overly long words | During the preceding year, the company accelerated productive operations. | Last year the company sped up operations. |
| | The action was predicated on the assumption that the company was operating at a financial deficit. | The action was based on the belief that the company was losing money. |
| Using wordy phrases rather than infinitives | If you want success as a writer, you must work hard. | To succeed as a writer, you must work hard. |
| | He went to the library for the purpose of studying. | He went to the library to study. |
| | The employer increased salaries so that she could improve morale. | The employer increased salaries to improve morale. |
| **Redundancies** | | |
| Repeating meanings | absolutely complete | complete |
| | basic fundamentals | fundamentals |
| | follows after | follows |
| | free and clear | free |
| | refer back | refer |
| | repeat again | repeat |
| | collect together | collect |
| | future plans | plans |
| | return back | return |
| | important essentials | essentials |
| | end result | result |
| | actual truth | truth |
| | final outcome | outcome |
| | uniquely unusual | unique |
| | surrounded on all sides | surrounded |
| Using double modifiers | modern, up-to-date equipment | modern equipment |
| ***It Is/There Are* Starters** | It would be appreciated if you would sign the lease today. | Please sign the lease today. |
| Starting sentences with *It* or *There* | There are five employees in this division who were late to work today. | Five employees in this division were late to work today. |

The layout is *statically balanced*, with equal visual weight on either side of the vertical centerline.

The picture of the anvil (a device used by blacksmiths to shape pieces of iron) plays off the company name and provides visual interest without overwhelming the page.

These three concise labels are the "subheadings" of the website, directing readers to each of the major sections of content.

These introductory paragraphs offer succinct summaries of the three content areas. The centered paragraphs promote the look of calm balance, and in these small sections the centered text is easy to read.

When a reader clicks on any of the three sections above, this area presents the next level of detail.

Readers can "drill down" through layers of information without getting overwhelmed by large amounts of text or distracting visual elements.


MyBCommLab Apply Figure 5.3's key concepts by going to **mybcommlab.com**

**Figure 5.3 Designing for Readability**
The website of the web development firm Iron to Iron is a model of elegant design that promotes easy reading.
*Source:* Iron to Iron, LLC.

## White Space

White space separates elements in a document and helps guide the reader's eye.

Any space free of text or artwork is considered **white space**. (Note that "white space" isn't necessarily white.) These unused areas provide visual contrast and important resting points for your readers. White space includes the open area surrounding headings, margins, paragraph indents, space around images, vertical space between columns, and horizontal space between paragraphs or lines of text. To increase the chance that readers will read your messages, be generous with white space; it makes pages and screens feel less intimidating and easier to read.[6]

## Margins and Justification

Margins define the space around text and between text columns. In addition to their width, the look and feel of margins are influenced by the way you arrange lines of text, which can be set (1) *justified* (which means they are *flush*, or aligned vertically, on both the left and the right), (2) flush left with a *ragged-right* margin, (3) flush right with a *ragged-left* margin, or (4) centered. This paragraph is justified, whereas the paragraphs in Figure 5.2 on page 154 are flush left with a ragged-right margin.

REAL-TIME UPDATES
LEARN MORE BY READING THIS ARTICLE

**Improve your document designs by learning the fundamentals of typography**

Knowing the basics of type usage will help you create more effective page and screen layouts. Go to **http://real-timeupdates.com/bce7.** Under "Students," click on "Learn More."

Magazines, newspapers, and books often use justified type because it can accommodate more text in a given space. However, justified type needs to be used with care and is not a good choice for most routine business documents. First, it creates a denser look because the uniform line lengths decrease the amount of white space along the right margin. Second, it produces a more formal look that isn't appropriate for all situations. Third, unless it is formatted with skill and attention, justified type can be more difficult to read because it can produce large gaps between words and excessive hyphenation at the ends of lines. Publishing specialists have the time and skill needed to carefully adjust character and word spacing to eliminate these problems. (In some cases, sentences are even rewritten to improve the appearance of the printed page.) Because most business communicators don't have that time or skill, it's best to avoid justified type in most business documents.

In contrast to justified type, flush-left, ragged-right type creates a more open appearance on the page, producing a less formal and more contemporary look. Spacing between words is consistent, and only long words that fall at the ends of lines are hyphenated.

Most business documents use a flush-left margin and a ragged-right margin.

Centered type is rarely used for text paragraphs but is commonly used for headings and subheadings. Flush-right, ragged-left type is rarely used.

## Typefaces

**Typeface** refers to the physical design of letters, numbers, and other text characters. (*Font* and *typeface* are often used interchangeably, although strictly speaking, a font is a set of characters in a given typeface.) Typeface influences the tone of your message, making it look authoritative or friendly, businesslike or casual, classic or modern, and so on (see Table 5.3). Be sure to choose fonts that are appropriate for your message; many of the fonts on your computer are not appropriate for business use.

**Serif typefaces** have small crosslines (called serifs) at the ends of each letter stroke. **Sans serif typefaces**, in contrast, lack these serifs. For years, the conventional wisdom in typography was that serif faces were easier to read in long blocks of text, because the serifs made it easier for the eye to pick out individual letters. Accordingly, the standard advice was to use serif faces for the body of a document and sans serif for headings and subheadings.

However, the research behind the conventional wisdom is not as conclusive as once thought.[7] In fact, many sans serif typefaces work as well or better for body text than some serif typefaces. This seems to be particularly true on screens, which often have lower resolution than printed text. Many contemporary documents and webpages now use sans serif for body text.

The classic style of document design uses a sans serif typeface for headings and a serif typeface for regular paragraph text; however, many contemporary documents and webpages now use all sans serif.

For most documents, you shouldn't need more than two typefaces, although if you want to make captions or other text elements stand out, you can use another font.[8] Using more typefaces can clutter a document and produce an amateurish look.

## Type Styles

**Type style** refers to any modification that lends contrast or emphasis to type, including boldface, italic, underlining, and color. For example, you can boldface individual words

**TABLE 5.3 Typeface Personalities: Serious to Casual to Playful**

| Serif Typefaces | Sans Serif Typefaces | Specialty Typefaces (Rarely Used for Routine Business Communication) |
|---|---|---|
| Bookman Old Style | Arial | Bauhaus |
| Century Schoolbook | Calibri | Spring LP |
| Courier | **Eras Bold** | Edwardian Script |
| Garamond | Franklin Gothic Book | Lucida Handwriting |
| Georgia | Gill Sans | Old English |
| Times New Roman | Verdana | **STENCIL** |

REAL-TIME UPDATES
LEARN MORE BY VISITING THIS WEBSITE

**See the newest designs from some of the brightest minds in typography**

Type design is a fascinating and dynamic field; this portfolio shows dozens of innovative new typefaces. Go to **http://real-timeupdates.com/bce7.** Under "Students," click on "Learn More."

or phrases to draw more attention to them. Italic type has specific uses as well, such as highlighting quotations and indicating foreign words, irony, humor, book and movie titles, and unconventional usage. Use any type style in moderation. For instance, underlining or using all-uppercase letters can interfere with the reader's ability to recognize the shapes of words, improperly placed boldface or italicized type can slow down your reader, and shadowed or outlined type can seriously hinder legibility.

Avoid using any type style that inhibits your audience's ability to read your messages.

For most printed business messages, use a type size of 10 to 12 points for regular text and 12 to 18 points for headings and subheadings. (A point is approximately 1/72 inch.) Resist the temptation to reduce the type size to squeeze in text or to enlarge it to fill up space. Type that is too small is hard to read, whereas extra-large type often looks unprofessional.

### DESIGNING MESSAGES FOR MOBILE DEVICES

In addition to making your content mobile-friendly using the writing tips in Chapter 4 (see pages 141–143), you can follow these steps to format that content for mobile devices:

- **Think in small chunks.** Remember that mobile users consume information one screen at a time, so try to divide your message into independent, easy-to-consume bites. If readers have to scroll through a dozen screens to piece together your message, they might miss your point or just give up entirely.
- **Make generous use of white space.** White space is always helpful, but it's critical on small screens because readers are trying to get the point of every message as quickly as possible. Keep your paragraphs short (4–6 lines) and separate them with blank lines so the reader's eyes can easily jump from one point to the next.[9]
- **Format simply.** Avoid anything that is likely to get in the way of fast, easy reading, including busy typefaces, complex graphics, and complicated layouts.
- **Consider horizontal and vertical layouts.** Most phones and tablets can automatically rotate their screen content from horizontal to vertical as the user rotates the device. A layout that doesn't work well with the narrow vertical perspective might be acceptable at the wider horizontal perspective.

Compare the two messages in Figure 5.4; notice how much more difficult the screen in Figure 5.4a is to read.

## Proofreading Your Message

5 LEARNING OBJECTIVE
Explain the importance of proofreading, and give six tips for successful proofreading.

Proofreading is the quality inspection stage for your documents. It is your last chance to make sure your document is ready to carry your message—and your reputation—to the intended audience. Even a small mistake can doom your efforts, so take proofreading seriously.

Your credibility is affected by your attention to the details of mechanics and form.

Look for two types of problems: (1) undetected mistakes from the writing, design, and layout stages and (2) mistakes that crept in during production. For the first category, you can review format and layout guidelines in Appendix A (including standard formats for letters and memos) and brush up on writing basics with the Handbook of Grammar, Mechanics, and Usage at the end of the book. The second category can include anything from computer glitches such as missing fonts to broken web links to problems with the ink used in printing. Be particularly vigilant with complex documents and production processes that involve teams of people and multiple computers. Strange things can happen as files move from computer to computer, especially when lots of separate media elements are involved.

The types of details to look for when proofreading include language errors, missing material, design errors, and typographical errors.

To be most effective, proofreading should be a methodical procedure in which you look for specific problems. Here is some advice from the pros:

MOBILE APPS
NounPlus puts a grammar checker, spell checker, and pronunciation guide on your phone, so you're never without tips and advice.

- **Make multiple passes.** Go through the document several times, focusing on a different aspect each time. For instance, look for content errors the first time and layout errors the second time.


Figure 5.4a

White space between the heading and the body text helps readers perceive the heading as a single block of text.

Generous margins reduce the visual clutter on screen.

The sans serif typeface (right) is easier to read than the serif typeface (left).

Shorter paragraphs simplify reading and allow for more white space breaks between paragraphs.


Figure 5.4b

**Figure 5.4 Designing for Mobile Devices**
Even simple changes such as revising with shorter paragraphs, choosing cleaner typefaces, and making generous use of white space in and around the text can dramatically improve readability on mobile screens.

- **Use perceptual tricks.** To keep from missing errors that are "in plain sight," try reading pages backward, placing your finger under each word and reading it silently, covering everything but the line you're currently reading, or reading the document aloud.
- **Focus on high-priority items.** Double-check names, titles, dates, addresses, and any number that could cause grief if incorrect.
- **Get some distance.** If possible, don't proofread immediately after finishing the document. Let your brain wander off to new topics and then come back fresh later.
- **Stay focused and vigilant.** Block out distractions and focus as completely as possible on your proofreading. Avoid reading large amounts of material in one sitting and try not to proofread when you're tired.
- **Take your time.** Quick proofreading is not careful proofreading.

Table 5.4 offers some handy tips to improve your proofreading efforts.

**REAL-TIME UPDATES**
LEARN MORE BY LISTENING TO THIS PODCAST
**Tips for proofing your papers**
This advice for class assignments will help you on the job, too. Go to **http://real-timeupdates.com/bce7.** Under "Students," click on "Learn More."

# Distributing Your Message

With the production finished, you're ready to distribute your message. You don't always have a choice of which distribution method to use, but if you do, consider the following factors:

- **Cost.** Cost isn't a concern for most messages, but for multiple copies of lengthy reports or multimedia productions, it might well be. Weigh the cost and the benefits before you decide. Be sure to consider the nonverbal message you send regarding cost as well. Overnight delivery of a printed report could look responsive in one instance and wasteful in another, for example.

6 LEARNING OBJECTIVE
Discuss the most important issues to consider when distributing your messages.

Consider cost, convenience, time, security, and privacy when choosing a distribution method.

**TABLE 5.4 Proofreading Tips**

**Look for Writing and Typing Errors**

✓ Typographical mistakes
✓ Misspelled words
✓ Grammatical errors
✓ Punctuation mistakes

**Look for Design and Layout Errors**

✓ Violation of company standards
✓ Page or screen layout errors (such as incorrect margins and column formatting)
✓ Clumsy page breaks or line breaks
✓ Inconsistent font usage (such as with headings and subheadings)
✓ Alignment problems (columns, headers, footers, and graphics)
✓ Missing or incorrect page and section numbers
✓ Missing or incorrect page headers or footers
✓ Missing or incorrect URLs, email addresses, or other contact information
✓ Missing or incorrect photos and other graphical elements
✓ Missing or incorrect source notes, copyright notices, or other reference items

**Look for Production Errors**

✓ Printing problems
✓ Browser compatibility problems
✓ Screen size or resolution issues for mobile devices
✓ Incorrect or missing tags on blog posts

- **Convenience.** Make sure your audience can conveniently access the material you send. For instance, sending huge files may be fine on a fast office network, but receiving such files can be a major headache for remote colleagues trying to download them over slower wireless networks.
- **Time.** How soon does the message need to reach the audience? Don't waste money on overnight delivery if the recipient won't read a report for a week.
- **Security and privacy.** The convenience offered by digital communication needs to be weighed against security and privacy concerns. For the most sensitive messages, your company will probably have restrictions on distribution (including who is allowed to receive certain messages and the channels you can use to distribute them). In addition, most computer users are wary of opening attachments these days, particularly word processor files (which are vulnerable to macro viruses and other risks). As an alternative, you can convert your documents to PDF files using Adobe Acrobat or an equivalent product.

**MOBILE APPS**
SignEasy solves the problem of signing digital documents such as contracts; you can sign right on your phone screen.

# Chapter Review and Activities

## Learning Objectives: Check Your Progress

**Objective 1: Discuss the value of careful revision, and describe the tasks involved in evaluating your first drafts and the work of other writers.**

Revision is an essential aspect of completing messages because it can nearly always make your first drafts tighter, clearer, and more compelling. Revision consists of three main tasks: (1) evaluating content, organization, and tone; (2) reviewing for readability; and (3) editing for clarity and conciseness. After you revise your message, complete it by using design elements effectively, proofreading to ensure quality, and distributing it to your audience.

When asked to evaluate, edit, or revise someone else's work, recognize the dual responsibility that doing so entails: Remember that your job is to help the other writer succeed at his or her task, and make sure you understand the writer's intent.

**Objective 2: List four techniques you can use to improve the readability of your messages.**

Four techniques that improve readability are varying sentence length, keeping paragraphs short, using lists and bullets, and adding headings and subheadings. Varying sentence length helps make your writing more dynamic while emphasizing the most important points. Paragraphs are usually best kept short to make it easier for readers to consume information in manageable chunks. Lists and bullets are effective devices for delineating sets of items, steps, or other collections of related information. Headings and subheadings organize your message, call attention to important information, and help readers make connections between related pieces of information.

**Objective 3: Describe the steps you can take to improve the clarity of your writing, and give four tips on making your writing more concise.**

As you work to clarify your messages, (1) break up overly long sentences, (2) rewrite hedging sentences, (3) impose parallelism, (4) correct dangling modifiers, (5) reword long noun sequences, (6) replace camouflaged verbs, (7) clarify sentence structure, and (8) clarify awkward references. To make messages more concise, include only necessary material and write uncluttered sentences by (1) deleting unnecessary words and phrases, (2) shortening overly long words and phrases, (3) eliminating redundancies, and (4) recasting sentences that begin with "It is" and "There are."

**Objective 4: List four principles of effective design, and explain the role of major design elements in document readability.**

Four key principles of effective design are consistency, balance, restraint, and detail. Major design elements for documents include white space, margins and justification, typefaces, and type styles. White space provides contrast and balance. Margins define the space around the text and contribute to the amount of white space. Typefaces influence the tone of the message. Type styles—boldface, italics, and underlining—provide contrast or emphasis. When selecting and applying design elements, be consistent throughout your document; balance text, art, and white space; show restraint in the number of elements you use; and pay attention to every detail.

**Objective 5: Explain the importance of proofreading, and give six tips for successful proofreading.**

Proofreading is the quality inspection stage for your documents. It is your last chance to make sure your document is ready to carry your message—and your reputation—to the intended audience. Even a small mistake can doom your efforts, so take proofreading seriously. Six tips for effective proofreading are (1) make multiple passes looking for specific problems each time, (2) use perceptual tricks such as reading backwards or reading aloud, (3) focus on high-priority items, (4) try not to proofread immediately after completing a document, (5) stay focused and vigilant, and (6) take your time.

**Objective 6: Discuss the most important issues to consider when distributing your messages.**

Consider cost, convenience, time, security, and privacy when choosing the method to distribute your messages. Always consider security and privacy issues before distributing messages that contain sensitive or confidential information.

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Go to **mybcommlab.com** to complete the problems marked with this icon ✪.

# Test Your Knowledge

To review chapter content related to each question, refer to the indicated Learning Objective.

**5-1.** What should you evaluate when you begin the revision of your writing? [LO-1]

✪ **5-2.** What should you bear in mind when reviewing and editing the work of other writers? [LO-1]

✪ **5-3.** What four techniques would improve the readability of your message? [LO-2]

**5-4.** Why is proofreading important? List the elements that will make it successful. [LO-5]

**5-5.** What factors should you consider when choosing a method for distributing a message (other than for systems where you don't have a choice)? [LO-6]

# Apply Your Knowledge

To review chapter content related to each question, refer to the indicated Learning Objective.

✪ **5-6.** What are the two key aspects to be considered before evaluating another person's document? [LO-1]

✪ **5-7.** If you have to edit the individual documents of your product team before submitting them for publication, what are the elements you would consider to ensure the clarity of each text? [LO-3]

**5-8.** How does white space help with readability on mobile screens? [LO-4]

**5-9.** In distributing confidential and time-bound messages, what factors need to be considered? [LO-6]

# Practice Your Skills

## Exercises for Perfecting Your Writing

To review chapter content related to each set of exercises, refer to the indicated Learning Objective.

**Revising Messages: Clarity:** Break the following sentences into shorter ones; revise as necessary to maintain sense and smooth flow. [LO-3]

**5-10.** The next time you write something, check your average sentence length in a 100-word passage, and if your sentences average more than 16 to 20 words, see whether you can break up some of the sentences.

**5-11.** Don't do what the village blacksmith did when he instructed his apprentice as follows: "When I take the shoe out of the fire, I'll lay it on the anvil, and when I nod my head, you hit it with the hammer." The apprentice did just as he was told, and now he's the village blacksmith.

**5-12.** Unfortunately, no gadget will produce excellent writing, but using spell checkers and grammar checkers can help by catching common spelling errors and raising grammatical points that writers might want to reconsider, such as suspect sentence structure and problems with noun–verb agreement.

**5-13.** Know the flexibility of the written word and its power to convey an idea, and know how to make your words behave so that your readers will understand.

**Revising Messages: Conciseness:** Eliminate unnecessary words in the following sentences. [LO-3]

**5-14.** The board cannot act without a consensus of opinion.
**5-15.** To surpass our competitors, we need new innovations both in products and in company operations.
**5-16.** The chief executive of our company has been nominated again as "Best CEO of the Year" for two years in a row.
**5-17.** Don't pay more than you have to; you can get our new fragrance for a price of just $50.

**Revising Messages: Conciseness:** Revise the following sentences, using shorter, simpler words. [LO-3]

**5-18.** The antiquated calculator is ineffectual for solving sophisticated problems.
**5-19.** It is imperative that the pay increments be terminated before an inordinate deficit is accumulated.
**5-20.** Mr. Smith's lackadaisical attitude and callous behavior at the workplace warrants stern punitive action and could impact his promotion.
**5-21.** The impending liquidation of the company's assets was cause for jubilation among the company's competitors.

**Revising Messages: Conciseness:** Use infinitives as substitutes for the overly long phrases in the following sentences. [LO-3]

**5-22.** For living, I require money.
**5-23.** They did not find sufficient evidence for believing in the future.
**5-24.** Bringing about the destruction of a dream is tragic.

**Revising Messages: Conciseness:** Condense the following sentences to as few words as possible; revise as needed to maintain clarity and sense. [LO-3]

**5-25.** We are of the conviction that writing is important.
**5-26.** In all probability, we're likely to have a price increase.
**5-27.** Our goals include making a determination about that in the near future.
**5-28.** When the minister summed up and ended his deliberation on the topic of controlling birth rates, the audience quickly rushed out.

**Revising Messages: Modifiers:** Remove all the unnecessary modifiers from the following sentences. [LO-3]

**5-29.** Tremendously high pay increases were given to the extraordinarily skilled and extremely conscientious employees.
**5-30.** The health ministry stated that the disease was extremely dangerous and alarmingly fatal.

**Revising Messages: Hedging:** Rewrite the following sentences so that they no longer contain any hedging. [LO-3]

**5-31.** It would appear that someone apparently entered illegally.
**5-32.** It seems apparent that changes in corporate culture in the long term are rather imperative.
**5-33.** It may be possible that Peter might just win the elections.
**5-34.** I believe Nancy apparently has somewhat greater influence over employees in the new-accounts department.

**Revising Messages: Indefinite Starters:** Rewrite the following sentences to eliminate the indefinite starters (forms of *There are* or *It is*). [LO-3]

**5-35.** There are several examples here to show that Elaine can't hold a position very long.
**5-36.** It would be greatly appreciated if every employee would make a generous contribution to Mildred Cook's retirement party.
**5-37.** It has been rumored in political circles that Ms. Robertson stands as the perfect choice for the post of governor for the district.
**5-38.** There is a rule that states that we cannot work overtime without permission.

**Revising Messages: Parallelism:** Revise the following sentences to fix the parallelism problems. [LO-3]

**5-39.** Mr. Hill is expected to lecture three days a week, to counsel two days a week, and must write for publication in his spare time.
**5-40.** She knows not only accounting, but she also reads Latin.
**5-41.** Both applicants had families, college degrees, and were in their thirties, with considerable accounting experience but few social connections.
**5-42.** This book was exciting, well written, and held my interest.

**Revising Messages: Awkward References:** Revise the following sentences to delete the awkward references. [LO-3]

**5-43.** The CEO of ABC Corp. and CIO of ABC Corp., responsible for information technology, attended the Digital Imaging Exhibition and the Electronics Exhibition, respectively, this month.
**5-44.** The Digital Imaging Exhibition and the Electronics Exhibition were inaugurated by the top brass at ABC Corp., the former by the CEO of the company and the latter by the CIO.
**5-45.** The inaugural speech given by the CEO of ABC Corp. received a standing ovation and the speech given by the CIO of ABC Corp. received a standing ovation too.
**5-46.** A laser printer and an inkjet printer were delivered to John and Megan, respectively.

**Revising Messages: Dangling Modifiers:** Rewrite the following sentences to clarify the dangling modifiers. [LO-3]

**5-47.** Running down the railroad tracks in a cloud of smoke, we watched the countryside glide by.
**5-48.** Lying on the shelf, Ruby saw the seashell.
**5-49.** In need of timely medical care and vaccines, many Ebola patients face death every day.
**5-50.** Being cluttered and filthy, Sandy took the whole afternoon to clean up her desk.

**Revising Messages: Noun Sequences:** Rewrite the following sentences to eliminate the long strings of nouns. [LO-3]

**5-51.** The focus of the meeting was a discussion of the bank interest rate deregulation issue.
**5-52.** Following the government task force report recommendations, we are revising our job applicant evaluation procedures.

**5-53.** The HR employee engagement initiative ensures employee motivation, lower staff attrition, and higher manpower productivity.

**5-54.** The supermarket warehouse inventory reduction plan will be implemented next month.

**Revising Messages: Sentence Structure:** Rearrange each of the following sentences to bring the subjects closer to their verbs. [LO-3]

**5-55.** Trudy, when she first saw the bull pawing the ground, ran.

**5-56.** It was Terri who, according to Ted, who is probably the worst gossip in the office (Tom excepted), mailed the wrong order.

**5-57.** William Oberstreet, in his book *Investment Capital Reconsidered*, writes of the mistakes that bankers through the decades have made.

**5-58.** The national disaster management team, despite receiving clear satellite images from the state meteorological department, ignored the signs of a massive tornado.

**Revising Messages: Camouflaged Verbs:** Rewrite each of the following sentences so that the verbs are no longer camouflaged. [LO-3]

**5-59.** Adaptation to the new rules was performed easily by the employees.

**5-60.** The assessor will make a determination of the tax due.

**5-61.** Verification of the identity of the employees must be made daily.

**5-62.** The board of directors made a recommendation that Mr. Ronson be assigned to a new division.

## Activities

Active links for all websites in this chapter can be found on MyBCommLab; see your User Guide for instructions on accessing the content for this chapter. Each activity is labeled according to the primary skill or skills you will need to use. To review relevant chapter content, you can refer to the indicated Learning Objective. In some instances, supporting information will be found in another chapter, as indicated.

**5-63. Collaboration: Evaluating the Work of Other Writers [LO-1]** Visit **http://real-timeupdates.com/bce7**, click on Student Assignments, then select Chapter 5, Activity 1. Download and open the document using word-processing software that can accommodate Microsoft Word documents and offers revision tracking and commenting features. Using your knowledge of effective writing and the tips on page 149 for evaluating the work of other writers, evaluate this message. Using the revision tracking feature, make any necessary corrections. Insert comments, as needed, to explain your changes to the author.

**5-64. Completing: Evaluating Content, Organization, and Tone; Collaboration: Using Collaboration Technologies [LO-1], Chapter 2** Visit **http://real-timeupdates.com/bce7**, click on Student Assignments, and then select Chapter 5, Activity 2. Copy the text of this assignment and use it to start a document in Zoho (free for personal use) or a comparable collaboration system. In a team of three or four students, evaluate the content, organization, and tone of this message. After you reach agreement on the problems in the message, use the system's tools to rewrite and revise the text.

**5-65. Communication Ethics: Making Ethical Choices; Media Skills: Blogging [LO-3]** The time and energy required for careful revision can often benefit you or your company directly. For example, reader-friendly product descriptions will increase the probability that website visitors will buy your products. But what about situations in which the quality of your writing and revision work really doesn't stand to benefit you directly? For instance, assume that you are putting a notice on your website, informing the local community about some upcoming construction to your manufacturing plant. The work will disrupt traffic for nearly a year and generate a significant amount of noise and air pollution, but knowing the specific dates and times of various construction activities will allow people to adjust their commutes and other activities to minimize the negative impact on their daily lives. However, your company does not sell products in the local area, so the people affected by all this are not potential customers. Moreover, providing accurate information to the surrounding community and updating it as the project progresses will take time away from your other job responsibilities. Do you have an ethical obligation to keep the local community informed with accurate, up-to-date information? Why or why not? In a post on your class blog, explain your position on this question.

**5-66. Completing: Revising for Readability [LO-2]** Rewrite the following paragraph to vary the length of the sentences and to shorten the paragraph so it looks more inviting to readers.

> Despite the rapid increase in the number of low-cost carriers today, the aviation industry is reporting losses in this segment, reportedly due to reduced passenger load on short sectors. This is also coupled with the increase in low-cost tickets, which is almost the same as those of full-service carriers. Passengers prefer full-service carriers, where passenger comfort benefits complement the overall flying experience, leaving a first-time customer with a pleasant experience of mid-air hospitality. Low-cost carriers like Fly-Right, East Air, and Indiana Airways have failed to report full-load capacity on short-haul sectors and are in a dilemma as to whether to discontinue services on these sectors or re-examine their business model and service offerings. It is apparent that the national aviation authorities must intervene to resolve this impasse and ensure that low-cost carriers such as the ones mentioned above are not threatened by the discounted promotional offerings of full-service carriers.

**5-67. Completing: Designing for Readability; Media Skills: Blogging [LO-5]** Compare the home pages of Bloomberg and MarketWatch, two websites that cover financial markets. What are your first impressions of these two sites? How do their overall designs compare in terms of information delivery and overall user experience? Choose three pieces of information that a visitor to these sites would be likely to look for, such as a current stock price, news from international markets, and commentary from market experts. Which site makes it easier to find this information? Why? Present your analysis in a post for your class blog.

**5-68. Completing: Designing for Readability** [LO-5] Visit http://real-timeupdates.com/bce7, click on Student Assignments, and then select Chapter 5 Designing for Readability Activity. Download and open the document in word-processing software capable of handling Microsoft Word files. Using the various page, paragraph, and font formatting options available in your word processor, modify the formatting of the document so that its visual tone matches the tone of the message.

# Expand Your Skills

## Critique the Professionals

Identify a company website that in your opinion violates one or more of the principles of good design discussed on page 158. Using whatever medium your instructor requests, write a brief analysis of the site (no more than one page), citing specific elements from the piece and support from the chapter.

## Sharpen Your Career Skills Online

Bovée and Thill's Business Communication Web Search, at http://websearch.businesscommunicationnetwork.com, is a unique research tool designed specifically for business communication research. Use the Web Search function to find a website, video, PDF document, podcast, or presentation that offers advice on any aspect of revising, designing, producing, or proofreading business messages. Write a brief email message to your instructor or a post for your class blog, describing the item that you found and summarizing the career skills information you learned from it.

# Improve Your Grammar, Mechanics, and Usage

You can download the text of this assignment from http://real-timeupdates.com/bce7; click on Student Assignments and then click on Chapter 5. Improve Your Grammar, Mechanics, and Usage.

## Level 1: Self-Assessment—Adverbs

Review Section 1.5 in the Handbook of Grammar, Mechanics, and Usage and then complete the following 15 items.

For the following items, indicate the correct adjective or adverb provided in parentheses.

**5-69.** Their performance has been (good, well).
**5-70.** I (sure, surely) do not know how to help you.
**5-71.** He feels (sick, sickly) again today.
**5-72.** Her (beauty, beautiful) looks won her the crown.
**5-73.** The redecorated offices look (good, well).

For the following items, provide the correct form of the adverb in parentheses.

**5-74.** Which of the two programs computes __________ (fast)?
**5-75.** Kate has held five jobs over 13 years, and she was __________ (recently) employed by Graphicon.
**5-76.** Could they be __________ (happily) employed than they are now?
**5-77.** Of the two we have in stock, this model is the __________ (well) designed.
**5-78.** Of all the arguments I've ever heard, yours is the __________ (logically) reasoned.

For the following items, rewrite the sentences to correct double negatives.

**5-79.** He doesn't seem to have none.
**5-80.** That machine is scarcely never used.
**5-81.** They can't get no replacement parts until Thursday.
**5-82.** It wasn't no different from the first event we promoted.
**5-83.** We've looked for it, and it doesn't seem to be nowhere.

## Level 2: Workplace Applications

The following items may contain errors in grammar, capitalization, punctuation, abbreviation, number style, word division, and vocabulary. Rewrite each sentence, correcting all errors. If a sentence has no errors, write "Correct" for that number.

**5-84.** All too often, whomever leaves the most out of his cost estimate is the one who wins the bid—if you can call it winning.
**5-85.** Continuous scams in the financial market compelled stock exchanges in countries all over the world to re-examine their antiquated insider trading norms.
**5-86.** Shoppers were disinterested in the world-wide Web initially because many hyped services, offered no real cost or convenience advantages over offline stores.
**5-87.** Different jobs and different customers call for different pricing, estimating, and negotiating strategies.
**5-88.** Get to know the customer and their expectations, get the customer to talk about their primary use for you're product.
**5-89.** To homeowners, who feel they have found a competent contractor who has they're best interest's at heart, price will not matter nearly as much.
**5-90.** If I was you, I would of avoided investing in large conglomerates in light of the collapse of energy trader, Enron Corp., over accounting irregularities.
**5-91.** Primarily the main role of the President of MiniVan Corporation; is having customer's servicing interests respond to within 24 hours.
**5-92.** To people in some areas of cyberspace "Advertising" is a four letter word but "Marketing" is perfectly acceptable.
**5-93.** In any business effort, making money requires planning. Strategic marketing, a good product, good customer service, considerable shrewdness—and much hard work.
**5-94.** The artist has created a master-piece which is depicting warring crimes.
**5-95.** Running at full capacity, millions of Nike shoes are being produced by manufacturing plants every day.
**5-96.** Photography trick showed him as holding up Eiffel Tower in a hand.
**5-97.** Starbucks are planning to add fruit drinks to their menu in states throughout the south.
**5-98.** Credit ratings ain't what they used to be.

## Level 3: Document Critique

The following document may contain errors in grammar, punctuation, capitalization, abbreviation, number style, vocabulary, and spelling. You will also find errors related to topics in this chapter. For example, look for ways to improve long words and phrases, redundancies, dangling modifiers, camouflaged verbs, and problems with parallelism as you improve this memo. As your instructor indicates, photocopy this page and correct all errors using standard proofreading marks (see Appendix C) or download the document and make the corrections in your word-processing software.

Memorandum

TO: Metro Power Employees
FROM: Susannah Beech, HR Administrator
SUBJECT: Ways to improve your response to technology failures
Date: 22 September 2015
Dear Metro Employees:

There is always a chance of racing toward a deadline and suddenly having equipment fall. The following includes a few proposed suggestions to help you stave off, and cope with, technical equipment and system failures:

- Stay cool. There are many technical failures so they are commonplace in business; and it is likely that your bosses and co-workers will understand that you're having a prolbem and why.
- Practice preventive maintenance: Use cleaning cloths and sprays regularly, liquids and foods should be kept away from keyboards and printers; and you should make sure systems are shut down when you leave at night.
- It is important for faster repair asistance to promptly report computer failures to Bart Stone assistant director of information services ext. 2238, who will get to your poblem as soon as it is humanly possible for him to do so but you must keep in mind that there are many people demanding his focused attention at any given time.
- If you suspect that a problem may be developing, don't wait until the crucial last moment to call for assistance.
- When a last-minute technical failure of equipment threatens to disrupt your composure you might want to consider taking a walk to calm down.

The last suggestion is perhaps the most important to keep your career on track. Lost tempers; taking out your feelings in violent outbursts, and rude language are threatening to co-workers and could result in a reprimand or other disciplinary action. By calling technical support lines for help, your equipment can stay in good working order and your temper will stay calm.

The timely implemention of repairs is important, so ask your supervisor for a list of support numbers to keep handy. Then, the next time you experience a technology giltch in your equipment or systems, there are going to be quite a few numbers handy for you to call to help you handle it as just another aspect of your business regeem.

Sincerely,
Susannah Beech
Human Resources Administrator

MyBCommLab

Go to **mybcommlab.com** for the following Assisted-graded writing questions:

**5-99.** Why should you let a first draft "age" for a while before you begin the revision process? [LO-1]

**5-100.** How do your typeface selections help determine the personality of your documents and messages? [LO-4]

## Endnotes

**1.** Martin Shovel, "How to Be an Outstanding Communicator," CreativityWorks blog, 16 May 2011, www.creativityworks.net; "About Us," CreativityWorks, 16 May 2011, www.creativityworks.net.
**2.** "Revision in Business Writing," Purdue OWL website, accessed 8 February 2008, http://owl.english.purdue.edu.
**3.** Holly Weeks, "The Best Memo You'll Ever Write," *Harvard Management Communication Letter*, Spring 2005, 3–5.
**4.** Lynn Gaertner-Johnston, "Best Practices for Bullet Points," Business Writing blog, 17 December 2005, www.businesswritingblog.com.
**5.** Deborah Gunn, "Looking Good on Paper," *Office Pro*, March 2004, 10–11.
**6.** Jacci Howard Bear, "Desktop Publishing Rules of Page Layout," About.com, accessed 22 August 2005, www.about.com.
**7.** Kas Thomas, "The Serif Readability Myth," assertTrue blog, 18 January 2013, asserttrue.blogspot.com; Ole Lund, "Knowledge Construction in Typography: The Case of Legibility Research and the Legibility of Sans Serif Typefaces," doctoral dissertation, University of Reading, October 1999.
**8.** Jacci Howard Bear, "Desktop Publishing Rules for How Many Fonts to Use," About.com, accessed 22 August 2005, www.about.com.
**9.** "Mobile Message Mayhem," Verne Ordman & Associates, accessed 12 March 2014, www.businesswriting.biz.

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PART 3

# Brief Business Messages



Stockbyte, Getty Images, Inc.—Stockbyte Royalty Free

# 6 Crafting Messages for Digital Channels

## LEARNING OBJECTIVES

After studying this chapter, you will be able to

1. Identify the major digital channels used for brief business messages, and describe the nine compositional modes needed for digital media
2. Describe the use of social networks in business communication
3. Explain how companies and business professionals can use information and content sharing websites
4. Describe the evolving role of email in business communication, and explain how to adapt the three-step writing process to email messages
5. Describe the business benefits of instant messaging (IM), and identify guidelines for effective IM in the workplace
6. Describe the use of blogging and microblogging in business communication, and briefly explain how to adapt the three-step process to blogging
7. Explain how to adapt the three-step writing process for podcasts



## Communication Matters . . .

"We use Facebook to make sure the customer is happy."
—Donnie Steele, Director of New Media, SmartPak

As proof that no business is too specialized or too far out of the mainstream to benefit from social media, Facebook is now an essential communication platform for SmartPak, a company whose primary market niche is nutritional supplements for horses. More than 200,000 fans use SmartPak's Facebook page to get updates on new products, post questions for a veterinarian, learn about the latest in animal care, and share the sense of community with other animal lovers. Steele says the company's initial strategy with Facebook was marketing new products, and while the social network remains one of the top "revenue referrers" to the SmartPak website, it now has a much broader role in serving customers.[1]

Photo courtesy of Donnie Steele

Many companies focus on brand-building and community-building efforts on Facebook, but SmartPak's Donnie Steele emphasizes the customer service aspects that Facebook enables.

# Digital Channels for Business Communication

1 LEARNING OBJECTIVE
Identify the major digital channels used for brief business messages, and describe the nine compositional modes needed for digital media.

SmartPak's choice of Facebook for customer communication may seem like an obvious move, but the use of social media represents a fundamental shift in business communication. The shift is still taking place, as more consumers adopt social and mobile media and as businesses experiment with the best ways to integrate these media and adapt them to their internal and external communication practices.

The range of options for short business messages continues to grow with innovations in digital and social media.

**Social media** such as Facebook are digital media/channel combinations that empower stakeholders as participants in the communication process by allowing them to share content, revise content, respond to content, or contribute new content. For instance, many people now rely heavily on content sharing through social media tools to get information of personal and professional interest. Additionally, many consumers and professionals frequently engage in "content snacking," consuming large numbers of small pieces of information and bypassing larger documents that might require more than a few minutes or even a few seconds to read.[2] Moreover, the amount of content accessed from mobile devices (with the challenges they present in terms of screen size and input mechanisms) continues to rise.[3] Faced with such behavior, communicators need to be more careful than ever to create audience-focused messages and to consider restructuring messages using more *teasers*, *orientations*, and *summaries* (see pages 175–177).

With all these changes taking place, the field of business communication is a lot more interesting—but also a lot more complicated—than it was just a few years ago. For example, newer and smaller firms have a better opportunity to compete against big companies with big communication budgets because the quality of the message and the credibility of the sender carry more weight in this new environment. Empowered stakeholders can use the reach of social media to help companies that appear to be acting in stakeholders' best interests and harm companies that are not. Social media also have the potential to increase transparency, with more eyes and ears to monitor business activities and to use the crowd's voice to demand accountability and change.

Social media reduce a communicator's control over messages.

Although social media have reduced the amount of control businesses have over the content and process of communication,[4] today's smart companies are learning how to adapt their communication efforts to this new media landscape and to welcome customers' participation. Social media are also revolutionizing internal communication, breaking down traditional barriers in the organizational hierarchy, promoting the flow of information and ideas, and enabling networks of individuals and organizations to collaborate on a global scale.[5]

Increasingly, employees expect the leaders in their organizations to be active in social media. In one recent study, more than 80 percent of U.S. employees agreed that "CEOs who engage in social media are better equipped than their peers to lead companies in a Web 2.0 world." Moreover, roughly the same percentage are more likely to trust companies whose leadership teams engage with stakeholders via social media, and they would prefer to work for such companies as well.[6]

## MEDIA CHOICES FOR BRIEF MESSAGES

Social media are not the only options available for business communication, of course. Individuals and companies have a broad range of options for sending brief messages (from one or two sentences up to several pages long), including the following:

- Social networks
- Information and content sharing sites
- Email
- Instant messaging (IM)
- Text messaging
- Blogging and microblogging
- Podcasting

This chapter covers all of these media, and Chapters 10 and 11 explore two other key media, websites and wikis, which are used for longer messages and documents.

As this list suggests, businesses use many of the same tools you use for personal communication. Generally speaking, companies are quick to jump on any communication platform where consumers are likely to congregate or that promise more-efficient internal or external communication.

Although most of your business communication is likely to be via digital means, don't automatically dismiss the benefits of printed messages. Here are several situations in which you should use a printed message over digital alternatives:

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**Should you email, text, or pick up the phone?**

These tips will help you make the best choice in various business situations. Go to **http://real-timeupdates.com/bce7**. Under "Students," click on "Learn More."

- When you want to make a formal impression
- When you are legally required to provide information in printed form
- When you want to stand out from the flood of digital messages
- When you need a permanent, unchangeable, or secure record

Even with the widespread use of digital formats, printed memos and letters still play an important role in business communication.

Obviously, if you can't reach a particular audience through digital channels, you'll also need to use a printed message. Appendix A offers guidelines on formatting printed memos and letters.

## COMPOSITIONAL MODES FOR DIGITAL MEDIA

As you practice using digital media in this course, focus on the principles of social media communication and the fundamentals of planning, writing, and completing messages, rather than on the specific details of any one medium or system.[7] Fortunately, the basic communication skills required usually transfer from one system to another. You can succeed with written communication in virtually all digital media by using one of nine *compositional modes*:

Communicating successfully with digital media requires a wide range of writing approaches.

- **Conversations.** IM is a great example of a written medium that mimics spoken conversation. And just as you wouldn't read a report to someone sitting in your office, you wouldn't use conversational modes to exchange large volumes of information or to communicate with more than a few people at once.
- **Comments and critiques.** One of the most powerful aspects of social media is the opportunity for interested parties to express opinions and provide feedback, whether it's leaving comments on a blog post or reviewing products on an e-commerce site. Sharing helpful tips and insightful commentary is also a great way to build your personal brand. To be an effective commenter, focus on short chunks of information that a broad spectrum of other site visitors will find helpful. Rants, insults, jokes, and blatant self-promotion are usually of little benefit to other visitors.
- **Orientations.** The ability to help people find their way through an unfamiliar system or subject is a valuable writing skill and a talent that readers greatly appreciate. Unlike summaries (see next item), orientations don't give away the key points in the collection of information, but rather tell readers where to find those points. Writing effective orientations can be a delicate balancing act because you need to know the material well enough to guide others through it while being able to step back and view it from the inexperienced perspective of a "newbie."
- **Summaries.** At the beginning of an article or webpage, a summary functions as a miniature version of the document, giving readers all the key points while skipping over details. At the end of an article or webpage, a summary functions as a review, reminding readers of the key points they've just read. A series of key points extracted from an article or webpage can also serve as a summary (see the discussion of *tweetables* below).
- **Reference materials.** One of the greatest benefits of the Internet is the access it can provide to vast quantities of reference materials—numerical or textual information that people typically don't read in a linear way but rather search through to find particular data points, trends, or other details. One of the challenges of writing reference material is that you can't always know how readers will want to access it. Making the information accessible via search engines is an important step. However, readers don't always

> **REAL-TIME UPDATES**
> LEARN MORE BY READING THIS ARTICLE
> **Telling compelling stories on social media**
> Storytelling is an effective business communication strategy, and social media can be the idea platform for it. Go to **http://real-timeupdates.com/bce7**. Under "Students," click on "Learn More."

know which search terms will yield the best results, so consider an orientation and organize the material in logical ways with clear headings that promote skimming.

- **Narratives.** The storytelling techniques covered in Chapter 3 (see page 118) can be effective in a wide variety of situations, from company histories to product reviews and demonstrations. Narratives work best when they have an intriguing beginning that piques readers' curiosity, a middle section that moves quickly through the challenges that an individual or company faced, and an inspiring or instructive ending that gives readers information they can apply in their own lives and jobs.

With Twitter and other super-short messaging systems, the ability to write a compelling *teaser* is an important skill.

- **Teasers.** Teasers intentionally withhold key pieces of information as a way to pull readers or listeners into a story or other document. Teasers are widely used in marketing and sales messages, such as a bit of copy on the outside of an envelope that promises important information on the inside. In digital media, the space limitations and URL linking capabilities of Twitter and other microblogging systems make them a natural tool for the teaser approach (see Figure 6.1). Be sure that the *payoff*, the information a teaser links to, is valuable and legitimate. You'll quickly lose credibility if readers think they are being tricked into clicking through to information they don't really want. (*Tweetables* are Twitter-ready bites of information extracted from a blog post or other messages. They often serve as teasers, although a series of them can make an effective summary as well.)
- **Status updates and announcements.** If you use social media frequently, much of your writing will involve status updates and announcements. However, don't post trivial

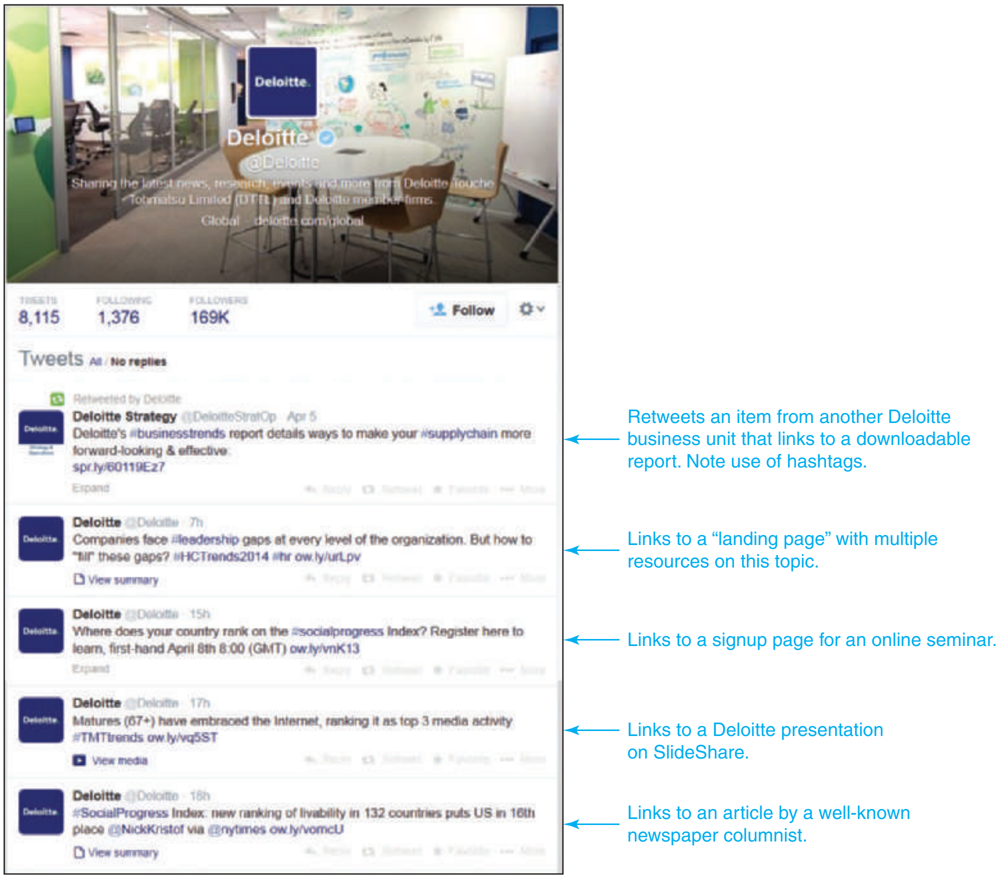



**Figure 6.1 Writing Teasers for Social Media**
The global accounting and consulting firm Deloitte uses Twitter to announce and promote a variety of topics and resources. Rather than relying on the 140-character tweets to convey the entire message, the company's tweets instead serve as teasers, encouraging readers to click through for more detailed information.
*Source:* Deloitte Global Services Twitter page. Copyright © 2012 Deloitte Global Services Limited. Reprinted with permission.

information that only you are likely to find interesting. Post only those updates that readers will find useful, and include only the information they need.

- **Tutorials.** Given the community nature of social media, the purpose of many messages is to share how-to advice. Becoming known as a reliable expert is a great way to build customer loyalty for your company while enhancing your own personal value.

## CREATING CONTENT FOR SOCIAL MEDIA

No matter what media or compositional mode you are using for a particular message, writing for social media requires a different approach than for traditional media. Whether you're writing a blog or posting a product demonstration video to YouTube, consider these tips for creating successful content for social media:[8]

Writing for social media requires a different approach than writing for traditional media.

- **Remember that it's a conversation, not a lecture or a sales pitch.** One of the great appeals of social media is the feeling of conversation, of people talking *with* one another instead of one person talking *at* everyone else. As more and more people gain a voice in the marketplace, companies that try to maintain the old "we talk, you listen" mindset are likely to be ignored in the social media landscape.
- **Write informally but not carelessly.** Write as a human being with a unique, personal voice. However, don't take this as a license to get sloppy; no one wants to slog through misspelled words and half-baked sentences to find your message.
- **Create concise, specific, and informative headlines.** Given the importance of headlines in the face of content snacking and information overload, headlines are extremely important in social media. Avoid the temptation to engage in clever wordplay when writing headlines and teasers. This advice applies to all forms of business communication, of course, but it is essential for social media. Readers don't want to spend time figuring out what your witty headlines mean. Search engines won't know what they mean either, so fewer people will find your content.
- **Get involved and stay involved.** Social media make some businesspeople nervous because they don't permit a high level of control over messages. However, don't hide from criticism. Take the opportunity to correct misinformation or explain how mistakes will be fixed.
- **Be transparent and honest.** Honesty is always essential, of course, but the social media environment is unforgiving. Attempts to twist the truth, withhold information, or hide behind a virtual barricade only invite attack in the "public square" of social media.
- **Think before you post!** Because of careless messages, individuals and companies have been sued because of Twitter updates, employees have been fired for Facebook wall postings, vital company secrets have been leaked, and business and personal relationships have been strained. Remember that you share the responsibility of keeping your company's and your customers' data private and secure. Assume that every message you send in any digital medium will be stored forever and might be read by people far beyond your original audience. Ask yourself two questions: First, "Would I say this to my audience face to face?" And second, "Am I comfortable with this message becoming a permanent part of my personal and professional communication history?"

A momentary lapse of concentration or judgment while using social media can cause tremendous career or company damage.

## OPTIMIZING CONTENT FOR MOBILE DEVICES

Chapters 4 and 5 offer tips on writing and formatting messages for mobile devices. While keeping the limitations of small screens and alternative input methods in mind, look for opportunities to take advantage of mobile-specific capabilities via apps and mobile-friendly websites. Mobile expands your options as a content creator, and it gives your audience members a wider range of more-engaging ways to consume your content:

Mobile offers a range of exciting ways to enhance the audience experience.

- **Location-based services.** *Location-based social networking* links the virtual world of online social networking with the physical world of retail stores and other locations. As mobile web use in general continues to grow, location-based networking promises to become an important business communication medium because mobile consumers are a significant economic force—through the purchases they make directly and through their ability to influence other consumers.[9]

**Figure 6.2 Wearable Technology**
Smartwatches and other wearable technologies can simplify and enhance everyday tasks such as note taking and brainstorming.
*Source:* Alissa Holland/Moment Mobile/Getty Images.

- **Gamification.** The addition of game-playing aspects to apps and web services, known as *gamification*, can increase audience engagement and encourage repeat use. Examples include Foursquare's "check-in" competitions and Bunchball's Nitro competitions for sales teams.[10]
- **Augmented reality.** Superimposing data on live camera images can help mobile consumers learn about companies and services in the immediate vicinity, for example. Another potential business use is on-the-job training, in which training content is provided as workers are learning or performing various tasks.
- **Wearable technology.** From virtual-reality goggles to smartwatches to body-movement sensors, wearable technology pushes the radical connectivity of mobile to the next level. Some of these work as auxiliary screens and controls for other mobile devices, but others are meant for independent use. One of the key promises of wearable technology is simplifying and enhancing everyday tasks for consumers and employees alike (see Figure 6.2).[11]
- **Mobile blogging.** Smartphones and tablets are idea for mobile blogs, sometimes referred to as *moblogs*. The mobile capability is great for workers whose jobs keep them on the move and for special-event coverage such as live-blogging trade shows and industry conventions.
- **Mobile podcasting.** Similarly, smartphone-based podcasting tools make it easy to record audio on the go and post finished podcasts to your blog or website.
- **Cloud-based services.** Mobile communication is ideal for cloud-based services—digital services that rely on resources stored in the cloud.

**MOBILE APPS**
Mobile Podcaster lets you record audio podcasts on your mobile devices and instantly post them on your WordPress blog.

## Social Networks

**2 LEARNING OBJECTIVE** Describe the use of social networks in business communication.

Social networks—online services that help people and organizations form connections and share information—have become a major force in both internal and external business communication in recent years. In addition to Facebook, a variety of public and private social networks are used by businesses and professionals. They can be grouped into three categories:

- **Public, general-purpose networks.** Facebook is the largest such network, although Google+ is rapidly gaining ground and is attracting many companies and brands.

Additionally, regionally focused networks have significant user bases in some countries, such as China's Renren and Kaixin001.[12]

- **Public, specialized networks.** Whereas Facebook and Google+ serve a wide variety of personal and professional needs, other networks focus on a particular function or a particular audience. The most widely known of these is LinkedIn, with its emphasis on career- and sales-related networking. Other networks address the needs of entrepreneurs, small-business owners, specific professions, product enthusiasts, and other narrower audiences.
- **Private networks.** Some companies have built private social networks for internal use. For example, the defense contractor Lockheed Martin created its Unity network, complete with a variety of social media applications, to meet the expectations of younger employees accustomed to social media and to capture the expert knowledge of older employees nearing retirement.[13]

Business communicators make use of a wide range of specialized and private social networks, in addition to public networks such as Facebook and Google+.

Regardless of the purpose and audience, social networks are most beneficial when all participants give and receive information, advice, support, and introductions—just as in offline social interaction. The following two sections describe how social networks are used in business communication and offer advice on using these platforms successfully.

## BUSINESS COMMUNICATION USES OF SOCIAL NETWORKS

With their ability to reach virtually unlimited numbers of people through a variety of digital formats, social networks are a great fit for many business communication needs. Here are some of the key applications of social networks for internal and external business communication:

- **Integrating company workforces.** Just as public networks can bring friends and family together, internal social networks can help companies grow closer, including helping new employees navigate their way through the organization, finding experts, mentors, and other important contacts; encouraging workforces to "jell" after reorganizations or mergers; and overcoming structural barriers in communication channels, bypassing the formal communication system to deliver information where it is needed in a timely fashion.
- **Fostering collaboration.** Networks can play a major role in collaboration by identifying the best people, both inside the company and in other companies, to collaborate on projects; finding pockets of knowledge and expertise within the organization; giving meeting or seminar participants a way to meet before an event and to maintain relationships after an event; accelerating the development of teams by helping members get to know one another and to identify individual areas of expertise; and sharing information throughout the organization.
- **Building communities.** Social networks are a natural tool for bringing together *communities of practice*, people who engage in similar work, and *communities of interest,* people who share enthusiasm for a particular product or activity. Large and geographically dispersed companies can benefit greatly from communities of practice that connect experts who may work in different divisions or different countries. Communities of interest that form around a specific product are sometimes called **brand communities**, and nurturing these communities can be a vital business communication task. A majority of consumers now trust their peers more than any other source of product information, so formal and informal brand communities are becoming an essential information source in consumer buying decisions.[14]
- **Socializing brands and companies.** According to one recent survey of company executives, *socialization* now accounts for more than half of a company or brand's global reputation.[15] **Brand socialization** is a measure of how effectively a company engages with its various online stakeholders in a mutually beneficial exchange of information.
- **Understanding target markets.** With hundreds of millions of people expressing themselves via social media, you can be sure that smart companies are listening. When asked about the value of having millions of Facebook fans, Coca-Cola CEO Muhtar Kent replied, "The value is you can talk with them. They tell you things that are important

*Socializing* a brand is becoming an increasingly important element of marketing and public relations strategies.

Social networks are vital tools for distributing information as well as gathering information about the business environment.

for your business and brands."[16] In addition, a number of tools now exist to gather market intelligence from social media more or less automatically. For example, *sentiment analysis* is an intriguing research technique in which companies track social networks and other media with automated language-analysis software that tries to take the pulse of public opinion and identify influential opinion makers.[17]

- **Recruiting employees and business partners.** Companies use social networks to find potential employees, short-term contractors, subject-matter experts, product and service suppliers, and business partners. A key advantage here is that these introductions are made via trusted connections in a professional network. On LinkedIn, for example, members can recommend each other based on current or past business relationships, which helps remove the uncertainty of initiating business relationships with complete strangers.
- **Connecting with sales prospects.** Salespeople on networks such as LinkedIn can use their network connections to identify potential buyers and then to ask for introductions through those shared connections. Sales networking can reduce *cold calling*, telephoning potential customers out of the blue—a practice that few people on either end of the conversation find pleasant.
- **Supporting customers.** Customer service is another one of the fundamental areas of business communication that have been revolutionized by social media. *Social customer service* involves using social networks and other social media tools to give customers a more convenient way to get help from the company and to help each other.
- **Extending the organization.** Social networking is also fueling the growth of *networked organizations*, sometimes known as virtual organizations, where companies supplement the talents of their employees with services from one or more external partners, such as a design lab, a manufacturing firm, or a sales and distribution company.

## STRATEGIES FOR BUSINESS COMMUNICATION ON SOCIAL NETWORKS

Social networks offer lots of business communication potential, but with those opportunities comes a certain degree of complexity. Moreover, the norms and practices of business social networking continue to evolve. Follow these guidelines to make the most of social networks for both personal branding and company communication:[18]

**MOBILE APPS**
The social media management app Social Oomph lets you monitor multiple social media sites, schedule updates, and perform other time-saving tasks.

- **Choose the best compositional mode for each message, purpose, and network.** As you visit various social networks, take some time to observe the variety of message types you see in different parts of each website. For example, the informal status update mode works well for Facebook Wall posts but would be less effective for company overviews and mission statements.
- **Offer valuable content to members of your online communities.** People don't join social networks to be sales targets, of course. They join looking for connections and information. *Content marketing* is the practice of providing free information that is valuable to community members but that also helps a company build closer ties with current and potential customers.[19]
- **Join existing conversations.** Search for online conversations that are already taking place. Answer questions, solve problems, and respond to rumors and misinformation.
- **Anchor your online presence in your hub.** Although it's important to join those conversations and be visible where your stakeholders are active, it's equally important to anchor your presence at your own central *hub*—a web presence you own and control. This can be a combination of a conventional website, a blog, and a company-sponsored online community, for example.[20] Use the hub to connect the various pieces of your online "self" (as an individual or a company) to make it easier for people to find and follow you. For example, you can link to your blog from your LinkedIn profile or automatically post your blog entries into the Notes tab on your Facebook page.
- **Facilitate community building.** Make it easy for customers and other audiences to connect with the company and with each other. For example, you can use the group feature on Facebook, LinkedIn, and other social networks to create and foster special-interest

groups within your networks. Groups are a great way to connect people who are interested in specific topics, such as owners of a particular product.

- **Restrict conventional promotional efforts to the right time and right place.** Persuasive communication efforts are still valid for specific communication tasks, such as regular advertising and the product information pages on a website, but efforts to inject blatant "salespeak" into social networking conversations will usually be rejected by the audience.
- **Maintain a consistent personality.** Each social network is a unique environment with particular norms of communication.[21] For example, as a strictly business-oriented network, LinkedIn has a more formal "vibe" than Facebook and Google+, which cater to both consumers and businesses. However, while adapting to the expectations of each network, be sure to maintain a consistent personality across all the networks in which you are active.[22]

Product promotion can be done on social networks, but it needs to be done in a low-key, indirect way.

See "Writing Promotional Messages for Social Media" in Chapter 9 (pages 268–269) for more tips on writing messages for social networks and other social media.

## Information and Media Sharing Sites

Social networks allow members to share information and media items as part of the networking experience, but a variety of systems have been designed specifically for sharing content. The field is diverse and still evolving, but the possibilities can be divided into user-generated content sites, content curation sites, and community Q&A sites.

3 LEARNING OBJECTIVE
Explain how companies and business professionals can use information and content sharing websites.

### USER-GENERATED CONTENT SITES

YouTube, Flickr, Yelp, and other **user-generated content (UGC) sites**, in which users rather than website owners contribute most or all of the content, have become serious business tools. On YouTube, for example, companies post everything from product demonstrations and TV commercials to company profiles and technical support explanations.

YouTube and other user-generated content sites are now important business communication channels.

As with other social media, the keys to effective user-generated content are making it valuable and making it easy. First, provide content that people want to see and share with colleagues. A video clip that explains how to use a product more effectively will be more popular than a clip that talks about how amazing the company behind the product is. Also, keep videos short, generally no longer than three to five minutes, if possible.[23]

Second, make material easy to find, consume, and share. For example, a *branded channel* on YouTube lets a company organize all its videos in one place, making it easy for visitors to browse the selection or subscribe to get automatic updates of future videos. Sharing features let fans share videos through email or their accounts on Twitter, Facebook, and other platforms.

### CONTENT CURATION SITES

Newsfeeds from blogs and other online publishers can be a great way to stay on top of developments in any field. However, anyone who has signed up for more than a few RSS feeds has probably experienced the "firehose effect" of getting so many feeds so quickly that it becomes impossible to stay on top of them. Moreover, when a highly active publisher feeds every new article, from the essential to the trivial, the reader is left to sort it all out every day.

An intriguing alternative to newsfeeds is **content curation**, in which someone with expertise or interest in a particular field collects and republishes material on a particular topic. The authors' Business Communication Headline News (**http://bchn.businesscommunicationnetwork.com**), for instance, was one of the earliest examples of content curation in the field of business communication.

Content curation is the process of collecting and presenting information on a particular topic in a way that makes it convenient for target readers.

New curation tools, including Pinterest and Scoop.it, make it easy to assemble attractive online magazines or portfolios on specific topics. Although it raises important issues regarding content ownership and message control,[24] curation has the potential to bring the power of community and shared expertise to a lot of different fields; ultimately, it could reshape audience behavior and therefore the practice of business communication.

# Business Communicators Innovating with Social Media

Companies in virtually every industry use social media and continue to experiment with new ways to connect with customers and other stakeholders. From offering helpful tips on using products to helping customers meet each other, these companies show the enormous range of possibilities that new media continue to bring to business communication.[25]

## General-Purpose Social Networks

**Most everyone is familiar** with Facebook and Google+, and thousands of companies are active on these popular social networks. In addition, a number of social networks exist just for businesses and business professionals, including LinkedIn, the largest of the business networks. Kelly Financial Resources, part of the Kelly Services staffing company, maintains a profile on LinkedIn, as do several hundred of its employees.

*Source:* Screenshot courtesy of Kelly Services company LinkedIn page. Copyright 2013 by Kelly Services, Inc. Used by Permission.



## Specialized Social Networks

**A number of companies now** host their own social networking sites, where product enthusiasts interact by sharing personal stories, offering advice, and commenting on products and company news—all brief-message functions that replace more traditional media options. For example, Specialized, a major bicycle manufacturer based in Morgan Hill, California, hosts the Specialized Riders Club, where customers can interact with each other and the professional riders the company sponsors. Similarly, the Segway Social network connects owners of these unique personal vehicles, including helping teams organize for Segway polo matches and other events.

*Source:* Segway Inc.


## User-Generated Content

**Many companies now encourage** user-generated content as a way to engage their stakeholders and provide additional value through shared expertise. The online shoe and apparel retailer Zappos, for example, invites customers to create and upload videos that communicate their experiences with Zappos and its products.

*Source:* Copyright © 2012 by Zappos IP, Inc. Used by permission.


## Value-Added Content via Blogging

**One of the best ways** to become a valued member of a network is to provide content that is useful to others in the network. The Quizzle personal finance blog offers a steady stream of articles and advice that help people manage their finances.

*Source:* Copyright © 2013 by Quizzle. Used by permission.


## Value-Added Content via Online Video

**Lie-Nielsen Toolworks of Warren,** Maine, uses its YouTube channel to offer valuable information on choosing and using premium woodworking tools. By providing sought-after information for both current and potential customers free of charge, these videos help Lie-Nielsen foster relationships with the worldwide woodworking community and solidify its position as one of the leaders in this market. Animal Planet, Best Western, and Taco Bell are among the many other companies that make effective use of branded channels on YouTube.

*Source:* Copyright © 2013 by Lie-Nielson Toolworks, Inc. Used by permission.


## Employee Recruiting

**General Electric (GE)** is one of many companies that now use Twitter to recruit new employees. GE uses its Twitter recruiting account (@GEConnections) to post job openings, talk about working at GE, and provide application advice to job seekers.

*Source:* Copyright © 2012 by General Electric. Used by permission.

### COMMUNITY Q&A SITES

**Community Q&A sites**, on which visitors answer questions posted by other visitors, are a contemporary twist on the early ethos of computer networking, which was people helping each other. (Groups of like-minded people connected online long before the World Wide Web was even created.) Community Q&A sites include dedicated customer support communities such as those hosted on Get Satisfaction and public sites such as Quora and Yahoo! Answers.

Community Q&A sites offer great opportunities for building your personal brand.

Responding to questions on Q&A sites can be a great way to build your personal brand, demonstrate your company's commitment to customer service, and counter misinformation about your company and its products. Keep in mind that when you respond to an individual query on a community Q&A site, you are also "responding in advance" to every person in the future who comes to the site with the same question. In other words, you are writing a type of reference material in addition to corresponding with the original questioner, so keep the long time frame and wider audience in mind.

## Email

4 LEARNING OBJECTIVE Describe the evolving role of email in business communication, and explain how to adapt the three-step writing process to email messages.

Email has been an important communication tool for many companies for several decades, and in the beginning it offered a huge advantage in speed and efficiency over the media it usually replaced (printed and faxed messages). Over the years, email began to be used for many communication tasks simply because it was the only widely available digital format for written messages and millions of users were comfortable with it. However, newer tools—such as instant messaging, blogs, microblogs, social networks, and shared workspaces—are taking over specific tasks for which they are better suited.[26] For example, email is not usually the best choice for conversational communication (IM is better) or project management discussions and updates (blogs, wikis, and various purpose-built systems are often preferable).

Email remains a primary format for companies, but better alternatives now exist for many types of communication.

In addition to the widespread availability of better alternatives for many communication purposes, the indiscriminate use of email has lowered its appeal in the eyes of many professionals. In a sense, email is too easy to use—with a couple of mouse clicks you can send low-value messages to multiple recipients or trigger long message chains that become impossible to follow as people chime in along the way. In fact, frustration with email is so high in some companies that managers are making changes to reduce or even eliminate its use for internal communication.[27]

Email can seem a bit "old school" in comparison to social networks and other technologies, but it is still one of the more important business communication media.

However, email still has compelling advantages that will keep it in steady use in many companies. First, email is universal. Anybody with an email address can reach anybody else with an email address, no matter which systems the senders and receivers are on. Second, email is still the best medium for many private, short- to medium-length messages, particularly when the exchange is limited to two people. Unlike with microblogs or IM, for instance, midsize messages are easy to compose and easy to read on email. Third, email's noninstantaneous nature is an advantage when used properly. Email lets senders compose substantial messages in private and on their own schedule, and it lets recipients read those messages at their leisure.

### PLANNING EMAIL MESSAGES

Do your part to stem the flood of email by making sure you don't send unnecessary messages or cc people who don't really need to see particular messages.

The solution to email overload starts in the planning step, by making sure every message has a useful, business-related purpose. Also, be aware that many companies now have formal email policies that specify how employees can use email, including restrictions against using company email service for personal messages, sending confidential information, or sending material that might be deemed objectionable. In addition, many employers now monitor email, either automatically with software programmed to look for sensitive content or manually via security staff actually reading selected email messages. Regardless of formal policies, though, every email user has a responsibility to avoid actions that could cause trouble, from opening virus-infected attachments to sending inappropriate photographs.

Even with fairly short messages, spend a moment or two on the message-planning tasks described in Chapter 3: analyzing the situation, gathering necessary information for your readers, and organizing your message. You'll save time in the long run because you will craft a more effective message on the first attempt. Your readers will get the information they need and won't have to generate follow-up messages asking for clarification or additional information.

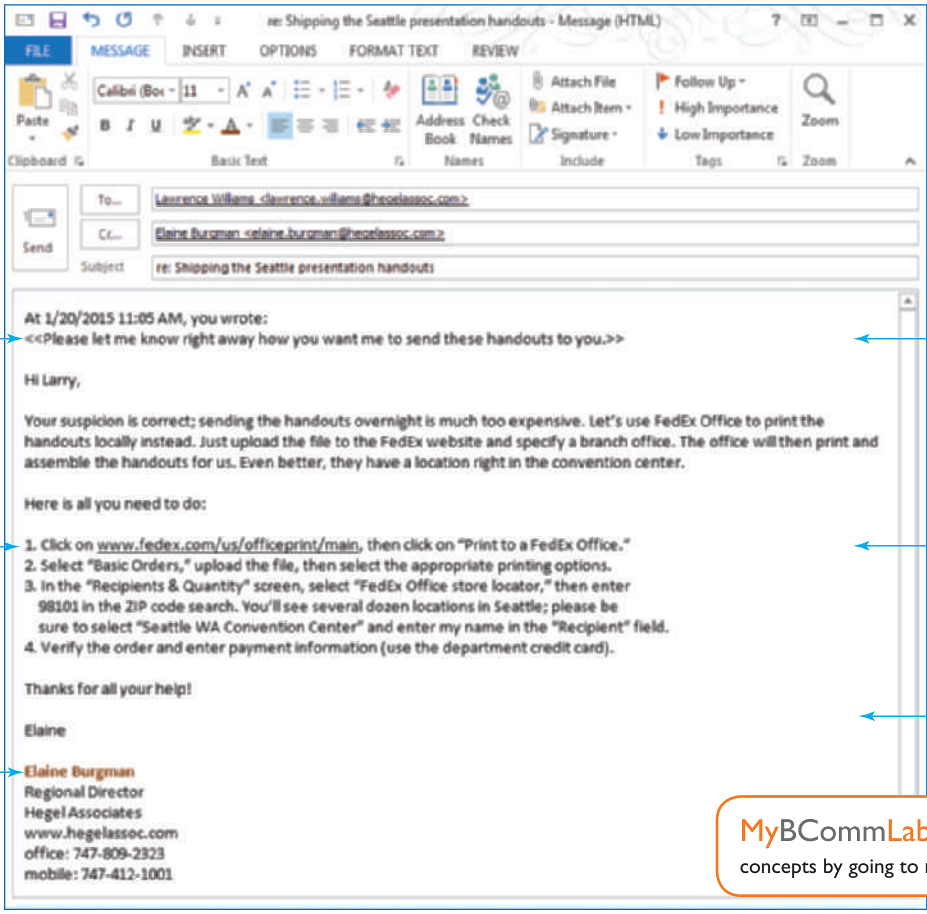
## WRITING EMAIL MESSAGES

When you approach email writing on the job, recognize that business email is a more formal medium than you are probably accustomed to with email for personal communication (see Figure 6.3). The expectations of writing quality for business email are higher than for personal email, and the consequences of bad writing or poor judgment can be much more serious. For example, email messages and other digital documents have the same legal weight as printed documents, and they are often used as evidence in lawsuits and criminal investigations.[28]

Business email messages are more formal than the email messages you send to family and friends.

The email subject line might seem like a small detail, but it is actually one of the most important parts of an email message because it helps recipients decide which messages to read and when to read them. To capture your audience's attention, make your subject lines informative and compelling. Go beyond simply describing or classifying your

A poorly written subject line could lead to a message being deleted or ignored.




Burgman includes enough of the original message to remind Williams why she is writing—but doesn't clutter the screen with the entire original message.

She opens with an informal salutation appropriate for communication between colleagues.

By itemizing the steps she wants Williams to follow, she makes it easy for him to respond and helps ensure that the work will be done correctly.

She includes the URL of the website she wants Williams to visit, so all he needs to do is click on the link.

The warm complimentary close expresses her appreciation for his efforts.

Her email signature includes alternative contact information, making it easy for the recipient to reach her.

MyBCommLab Apply Figure 6.3's key concepts by going to **mybcommlab.com**

**Figure 6.3 Email for Business Communication**
In this response to an email query from a colleague, Elaine Burgman takes advantage of her email system's features to create an efficient and effective message.
*Source:* Microsoft Outlook 2013, Microsoft Corporation.

message; use the opportunity to build interest with keywords, quotations, directions, or questions.[29] For example, "July sales results" accurately describes the content of the message, but "July sales results: good news and bad news" is more intriguing. Readers will want to know why some news is good and some is bad.

In addition, many email programs display the first few words or lines of incoming messages, even before the recipient opens them. In the words of social media public relations expert Steve Rubel, you can "tweetify" the opening lines of your email messages to make them stand out. In other words, choose the first few words carefully to grab your reader's attention.[30] Think of the first sentence as an extension of your subject line.

Attitudes about emoticons in business communication are changing; you'll have to use your best judgment in every case.

As a lean medium (see page 114), email can present challenges when you need to express particular emotional nuances, whether positive or negative. For years, users of email (as well as IM and text messaging) have used a variety of *emoticons* to express emotions in casual communication. For example, to express sympathy as a way to take some of the sting out of negative news, one might use a "frowny face," either the :( character string or a graphical emoticon such as ☹ or one of the colorful and sometimes animated characters available in some systems.

In the past, the use of emoticons was widely regarded as unprofessional and therefore advised against in business communication. Recently, though, an increasing number of professionals seem to be using them, particularly for communication with close colleagues, even as other professionals continue to view them as evidence of lazy or immature writing.[31] In the face of these conflicting perspectives, the best advice is to use caution. Avoid emoticons for all types of external communication and for formal internal communication, and avoid those bright yellow graphical emoticons (and particularly animated emoticons) in all business communication.

### COMPLETING EMAIL MESSAGES

Particularly for important messages, taking a few moments to revise and proofread might save you hours of headaches and damage control. Also, favor simplicity when it comes to producing your email messages. A clean, easily readable font, in black on a white background, is sufficient for nearly all email messages. Take advantage of your email system's ability to include an **email signature**, a small file that automatically includes such items as your full name, title, company, and contact information at the end of your messages.

Think twice before hitting Send. A simple mistake in your content or distribution can cause major headaches.

When you're ready to distribute your message, pause to verify what you're doing before you click Send. Make sure you've included everyone necessary—and no one else. Did you click Reply All when you meant to click only Reply? The difference could be embarrassing or even career threatening. Don't include people in the cc (courtesy copy) or bcc (blind courtesy copy) fields unless you know how these features work. (Everyone who receives the message can see who is on the cc line but not who is on the bcc line.) Also, don't set the message priority to "high" or "urgent" unless your message is truly urgent. And if you intend to include an attachment, be sure that it is indeed attached.

Table 6.1 offers a number of helpful tips for effective email; for the latest information on using email in business, visit **http://real-timeupdates.com/bce7** and click on Chapter 6.

## Instant Messaging and Text Messaging

**5 LEARNING OBJECTIVE**
Describe the business benefits of instant messaging (IM), and identify guidelines for effective IM in the workplace.

Computer-based **instant messaging (IM)**, in which users' messages appear on each other's screens instantly, is used extensively for internal and external communication. IM is available in both stand-alone systems and as a function embedded in online meeting systems, collaboration systems, social networks, and other platforms. For conversational exchanges, it's hard to top the advantages of IM, and the technology is replacing both email and voicemail in many situations.[32] Business-grade IM systems offer a range of capabilities, including basic chat, *presence awareness* (the ability to quickly see which people are at their desks and available to IM), remote display of documents, video capabilities, remote control of other computers, automated newsfeeds from blogs and websites, and automated *bot* (derived from the word *robot*) capabilities in which a computer can carry on simple conversations.[33]

IM is taking the place of email and voicemail for routine communication in many companies.

TABLE 6.1 **Tips for Effective Email Messages**

| Tip | Why It's Important |
| --- | --- |
| When you request information or action, make it clear what you're asking for, why it's important, and how soon you need it; don't make your reader write back for details. | People will be tempted to ignore your messages if they're not clear about what you want or how soon you want it. |
| When responding to a request, either paraphrase the request or include enough of the original message to remind the reader what you're replying to. | Some businesspeople get hundreds of email messages a day and may need reminding what your specific response is about. |
| If possible, avoid sending long, complex messages via email. | Long messages are easier to read as attached reports or web content. |
| Adjust the level of formality to the message and the audience. | Overly formal messages to colleagues can be perceived as stuffy and distant; overly informal messages to customers or top executives can be perceived as disrespectful. |
| Activate a signature file, which automatically pastes your contact information into every message you create. | A signature saves you the trouble of retyping vital information and ensures that recipients know how to reach you through other means. |
| Don't let unread messages pile up in your in-basket. | You'll miss important information and create the impression that you're ignoring other people. |
| Never type in all caps. | ALL CAPS ARE INTERPRETED AS SCREAMING. |
| Don't overformat your messages with background colors, multicolored type, unusual fonts, and so on. | Such messages can be difficult and annoying to read on screen. |
| Remember that messages can be forwarded anywhere and saved forever. | Don't let a moment of anger or poor judgment haunt you for the rest of your career. |
| Use the "return receipt requested" feature only for the most critical messages. | This feature triggers a message back to you whenever someone receives or opens your message; some consider this an invasion of privacy. |
| Make sure your computer has up-to-date virus protection. | One of the worst breaches of "netiquette" is infecting other computers because you haven't bothered to protect your own system. |
| Pay attention to grammar, spelling, and capitalization. | Some people don't think email needs formal rules, but careless messages make you look unprofessional and can annoy readers. |
| Use acronyms sparingly. | Shorthand such as IMHO (in my humble opinion) and LOL (laughing out loud) can be useful in informal correspondence with colleagues, but avoid using them in more formal messages. |
| Be careful with the use of emoticons. | Many people view the use of these symbols as unprofessional. |
| Assume that recipients may read your messages on small mobile screens. | Email is more difficult to read on small screens, so don't burden recipients with long, complicated messages. |

**Text messaging** has a number of applications in business as well, including marketing (alerting customers about new sale prices, for example), customer service (such as airline flight status, package tracking, and appointment reminders), security (for example, authenticating mobile banking transactions), crisis management (such as updating all employees working at a disaster scene), and process monitoring (alerting computer technicians to system failures, for example).[34] As it becomes more tightly integrated with other communication media, text messaging is likely to find even more widespread use in business communication. For instance, texting is now integrated into systems such as Facebook Messages and Gmail, and branded "StarStar numbers" can deliver web-based content such as videos, software apps, and digital coupons to mobile phones.[35]

Phone-based text messaging is being integrated into a variety of digital communication systems.

The following sections focus on IM, but many of the benefits, risks, and guidelines pertain to text messaging as well.

## UNDERSTANDING THE BENEFITS AND RISKS OF IM

The benefits of IM include its capability for rapid response to urgent messages, lower cost than phone calls and email, ability to mimic conversation more closely than email, and availability on a wide range of devices.[36] In addition, because it more closely resembles one-on-one conversation, IM doesn't get misused as a one-to-many broadcast method as often as email does.[37]

IM offers many benefits:

- Rapid response
- Low cost
- Ability to mimic conversation
- Wide availability

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**Etiquette guidelines for instant messaging**

As a lean medium, IM is particularly vulnerable to misunderstandings; learn how to avoid them. Go to **http://real-timeupdates.com/bce7**. Under "Students," click on "Learn More."

The potential drawbacks of IM include security problems (computer viruses, network infiltration, and the possibility that sensitive messages might be intercepted by outsiders), the need for *user authentication* (making sure that online correspondents are really who they appear to be), the challenge of logging messages for later review and archiving (a legal requirement in some industries), incompatibility between competing IM systems, and *spim* (unsolicited commercial messages, similar to email spam). Fortunately, with the growth of *enterprise instant messaging (EIM)*, or IM systems designed for large-scale corporate use, many of these problems are being overcome.

When using IM, be aware of the potential for constant interruptions and wasted time.

## ADAPTING THE THREE-STEP PROCESS FOR SUCCESSFUL IM

Although instant messages are often conceived, written, and sent within a matter of seconds, the principles of the three-step process still apply, particularly when communicating with customers and other important audiences:

Although you don't plan individual instant messages the same way you do longer messages, view important IM exchanges as conversations with specific goals in mind.

- **Planning instant messages.** Except for simple exchanges, take a moment to plan IM "conversations" in much the same way you would plan an important oral conversation. A few seconds of planning can help you deliver information in a coherent, complete way that minimizes the number of individual messages required.
- **Writing instant messages.** As with email, the appropriate writing style for business IM is more formal than the style you may be accustomed to with personal IM or text messaging (see Figure 6.4). Your company might discourage the use of IM acronyms (such as FWIW for "for what it's worth" or HTH for "hope that helps"), particularly for IM with external audiences.
- **Completing instant messages.** The only task in the completing stage is to send your message. Just quickly scan it before sending, to make sure you don't have any missing or misspelled words and verify that your message is clear and complete.

To use IM effectively, keep in mind some important behavioral issues when relying on this medium: the potential for constant interruptions, the ease of accidentally mixing personal and business messages, the risk of being out of the loop (if a hot discussion or an impromptu meeting flares up when you're away from your PC or other IM device), and the frustration of being at the mercy of other people's typing abilities.[38]

**Eduardo Lopes** – Hi Marcy, do you have a second?

**Marcy DeLong** – You bet. What's up?

Lopes ask if DeLong is available for a chat, rather than launching right into his discussion on the assumption that she can chat this minute.

**Eduardo Lopes** – I have a favor to ask, and I'm afraid I'm on a tight deadline. We need to cut the Qualcomm bid by 5%. Can we reduce the consulting time by 80 or 100 hrs?

He makes his request clearly and succinctly.

**Marcy DeLong** – That's a big chunk! I'm not sure we can cut that much, but I'll give it a try.

DeLong expresses skepticism, which helps to set the expectations for what she can deliver. Note how her tone remains positive, however.

**Eduardo Lopes** – I really appreciate it. Any chance you can get to it by noon my time?

He completes his request by provide a deadline. Note how he phrases it as a question, which is less jarring than a demand.

**Marcy DeLong** – No problem. I'll send you a revised bid sheet in an hour. Wish me luck...

She concludes with a positive response while gently reiterating the difficulty of the task.

MyBCommLab Apply Figure 6.4's key concepts by going to **mybcommlab.com**

**Figure 6.4 Instant Messaging for Business Communication**

Instant messaging is widely used in business, but you should not use the same informal style of communication you probably use for IM with your friends and family.

*Source:* Pearson Education, Inc.

Regardless of the system you're using, you can make IM more efficient and effective by heeding these tips:[39]

Understand the guidelines for successful business IM before you begin to use it.

- Be courteous; if you don't need an answer instantly, you can avoid interrupting someone by sending an email or other type of message instead.
- Unless a meeting is scheduled or you're expected to be available for other reasons, make yourself unavailable when you need to focus on other work.
- If you're not on a secure system, don't send confidential information using IM.
- Be extremely careful about sending personal messages—they have a tendency to pop up on other people's computers at embarrassing moments.
- Don't use IM for important but impromptu meetings if you can't verify that everyone concerned will be available.
- Don't use IM for lengthy, complex messages.
- Try to avoid carrying on multiple IM conversations at one time, to minimize the chance of sending messages to the wrong people or making one person wait while you tend to another conversation.
- Follow all security guidelines designed to keep your company's information and systems safe from attack.

For the latest information on using IM in business, visit **http://real-timeupdates.com/bce7** and click on Chapter 6.

# Blogging and Microblogging

6 LEARNING OBJECTIVE
Describe the use of blogging and microblogging in business communication, and briefly explain how to adapt the three-step process to blogging.

**Blogs**, online journals that are easier to personalize and update than conventional websites, have become a major force in business communication. Millions of business-oriented blogs are now in operation, and blogs have become an important source of information for consumers and professionals alike.[40] Good business blogs and microblogs pay close attention to several important elements:

Writing in a personal, authentic voice is key to attracting and keeping blog readers.

- **Communicating with personal style and an authentic voice.** Most business messages designed for large audiences are carefully scripted and written in a "corporate voice" that is impersonal and objective. In contrast, successful business blogs are written by individuals and exhibit their personal style. Audiences relate to this fresh approach and often build closer emotional bonds with the blogger's organization as a result.
- **Delivering new information quickly.** Blogging tools let you post new material as soon as you create it or find it. This feature not only allows you to respond quickly when needed—such as during a corporate crisis—but also lets your audiences know that active communication is taking place. Blogs that don't offer a continuous stream of new and interesting content are quickly ignored in today's online environment.
- **Choosing topics of peak interest to audiences.** Successful blogs cover topics that readers care about.
- **Encouraging audiences to join the conversation.** Not all blogs invite comments, although most do, and many bloggers consider comments to be an essential feature. Blog comments can be a valuable source of news, information, and insights. In addition, the informal nature of blogging seems to make it easier for companies to let their guard down and converse with their audiences. To protect against comments that are not helpful or appropriate, many bloggers review all comments and post only the most helpful or interesting ones.

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**Ten years later, are business blogs still a good investment?**
Mainstream business blogging had been around for about a decade; is it still a good way to connect with audiences? Go to **http://real-timeupdates.com/bce7**. Under "Students," click on "Learn More."

## UNDERSTANDING THE BUSINESS APPLICATIONS OF BLOGGING

Blogs are a potential solution whenever you have a continuing stream of information to share with an online audience—and particularly when you want the audience to have the opportunity to respond. Here are some of the many ways businesses are using blogs for internal and external communication:[41]

The business applications of blogs include a wide range of internal and external communication tasks.

- **Anchoring the social media presence.** As noted on page 180, the multiple threads of any social media program should be anchored in a central hub the company or individual owns and controls. Blogs make an ideal social media hub.
- **Project management and team communication.** Using blogs is a good way to keep project teams up to date, particularly when team members are geographically dispersed. For instance, the trip reports that employees file after visiting customers or other external parties can be enhanced vividly with mobile blogs.
- **Company news.** Companies can use blogs to keep employees informed about general business matters, from facility news to benefit updates. Blogs also serve as online community forums, giving everyone in the company a chance to raise questions and voice concerns.
- **Customer support.** Customer support blogs answer questions, offer tips and advice, and inform customers about new products. Also, many companies monitor the *blogosphere* (and *Twittersphere*), looking for complaints and responding with offers to help dissatisfied customers.[42]
- **Public relations and media relations.** Many company employees and executives now share company news with both the general public and journalists via their blogs.
- **Recruiting.** Using a blog is a great way to let potential employees know more about your company, the people who work there, and the nature of the company culture. In the other direction, employers often find and evaluate the blogs and microblogs of prospective employees, making blogging is a great way to build a name for yourself within your industry or profession.
- **Policy and issue discussions.** Executive blogs in particular provide a public forum for discussing legislation, regulations, and other broad issues of interest to an organization.
- **Crisis communication.** Using blogs is a convenient way to provide up-to-the-minute information during emergencies, correct misinformation, or respond to rumors.
- **Market research.** Blogs can be a clever mechanism for soliciting feedback from customers and experts in the marketplace. In addition to using their own blogs to solicit feedback, today's companies should monitor blogs that are likely to discuss them, their executives, and their products.
- **Brainstorming.** Online brainstorming via blogs offers a way for people to toss around ideas and build on each other's contributions.
- **Employee engagement.** Blogs can enhance communication across all levels of a company, giving lower-level employees a voice that they might not otherwise have and giving senior executives better access to timely information.
- **Customer education.** Blogs are a great way to help current and potential customers understand and use your products and services. This function can improve sales and support productivity as well, by reducing the need for one-on-one communication.

Blogs are an ideal medium for *word-of-mouth marketing*, the spread of promotional messages from one audience member to another.

- **Word-of-mouth marketing.** Bloggers often make a point of providing links to other blogs and websites that interest them, giving marketers a great opportunity to have their messages spread by enthusiasts. (Online word-of mouth marketing is often called *viral marketing* in reference to the way biological viruses are transmitted from person to person. However, viral marketing is not really an accurate metaphor. As author Brian Solis puts it, "There is no such thing as viral marketing."[43] Real viruses spread from host to host on their own, whereas word-of-mouth marketing spreads *voluntarily* from person to person. The distinction is critical, because you need to give people a good reason—good content, in other words—to pass along your message.)
- **Influencing traditional media news coverage.** According to social media consultant Tamar Weinberg, "the more prolific bloggers who provide valuable and consistent content are often considered experts in their subject matter" and are often called upon when journalists need insights into various topics.[44]
- **Community building.** Blogging is a great way to connect people with similar interests, and popular bloggers often attract a community of readers who connect with one another through the commenting function.

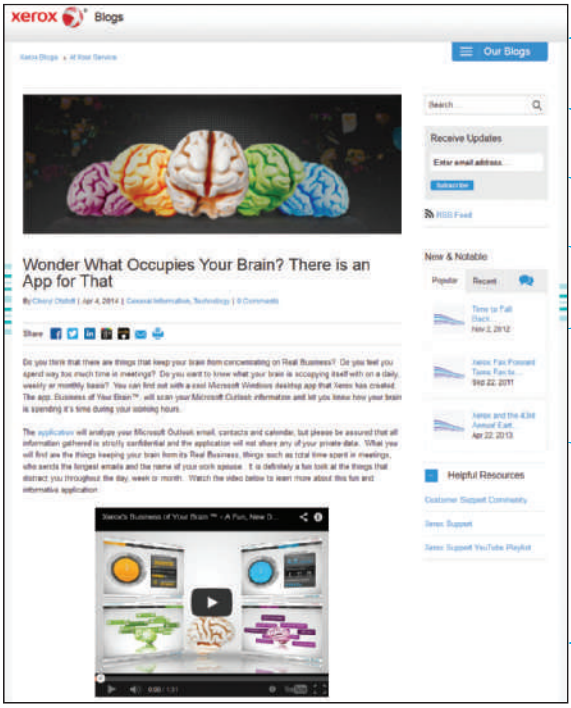


**Figure 6.5 Business Applications of Blogging**
This Xerox blog illustrates the content, writing style, and features that make an effective, reader-friendly company blog.
*Source:* Courtesy of Xerox Corp.

The uses of blogs are limited only by your creativity, so be on the lookout for new ways you can use them to foster positive relationships with colleagues, customers, and other important audiences (see Figure 6.5).

## ADAPTING THE THREE-STEP PROCESS FOR SUCCESSFUL BLOGGING

The three-step writing process is easy to adapt to blogging tasks. The planning step is particularly important when you're launching a blog because you're planning an entire communication channel, not just a single message. Pay close attention to your audience, your purpose, and your scope:

Before you launch a blog, make sure you have a clear understanding of your target audience, the purpose of your blog, and the scope of subjects you plan to cover.

- **Audience.** Except with team blogs and other efforts that have an obvious and well-defined audience, defining the target audience for a blog can be challenging. You want an audience large enough to justify the time you'll be investing but narrow enough that you can provide a clear focus for the blog. For instance, if you work for a firm that develops computer games, would you focus your blog on "hardcore" players, the types who spend thousands of dollars on super-fast PCs optimized for video games, or would you broaden the reach to include all video gamers? The decision often comes down to business strategy.
- **Purpose.** A business blog needs to have a business-related purpose that is important to your company and to your chosen audience. Moreover, the purpose has to "have legs"—that is, it needs to be something that can drive the blog's content for months or years—rather than focus on a single event or an issue of only temporary interest. For instance, if you're a technical expert, you might create a blog to give the audience tips and techniques for using your company's products more effectively—a never-ending subject that's important to both you and your audience. This would be the general purpose of your blog; each posting would have a specific purpose within the context of that general purpose. Finally, if you are not writing an official company blog but rather blogging as an individual employee, make sure you understand your employer's

blogging guidelines. IBM, for example, gives its employees 12 specific social computing guidelines, such as identifying their role as IBM employees if they are discussing matters related to the company and respecting intellectual property laws.[45]

- **Scope.** Defining the scope of your blog can be a bit tricky. You want to cover a subject area that is broad enough to offer discussion possibilities for months or years but narrow enough to have an identifiable focus.

After you begin writing your blog, careful planning needs to continue with each message. Unless you're posting to a restricted-access blog, such as an internal blog on a company intranet, you can never be sure who might see your posts. Other bloggers might link to them months or years later.

Write blog postings in a comfortable—but not careless—style.

Use a comfortable, personal writing style. Blog audiences don't want to hear from your company; they want to hear from *you*. Bear in mind, though, that comfortable does not mean careless. Sloppy writing damages your credibility. Successful blog content also needs to be interesting, valuable to readers, and as brief as possible.[46] In addition, although audiences expect you to be knowledgeable in the subject area your blog covers, you don't need to know everything about a topic. If you don't have all the information yourself, provide links to other blogs and websites that supply relevant information. In fact, content curation (see page 181) is one of the most valuable aspects of blogging. Just be sure the content you share is relevant to your readers and compatible with your communication goals.

Completing messages for your blog is usually quite easy. Evaluate the content and readability of your message, proofread to correct any errors, and post using your blogging system's tools. If you're using any contemporary blogging system, it should offer a *newsfeed* option so that your audience can automatically receive headlines and summaries of new blog posts. Really Simple Syndication (RSS) is the most common type of newsfeed.

Finally, make your material easier to find by **tagging** it with descriptive words. Your readers can then click on these "content labels" to find additional posts on those topics. Tags are usually displayed with each post, and they can also be groups in a *tag cloud* display, which shows all the tags in use on your blog.

Table 6.2 summarizes a number of suggestions for successful blogging. For the latest information on using blogs in business, visit **http://real-timeupdates.com/bce7** and click on Chapter 6.

## MICROBLOGGING

A **microblog** is a variation on blogging in which messages are sharply restricted to specific character counts. Twitter is the best known of these systems, but many others exist. Some companies have private microblogging systems for internal use only; these systems are sometimes referred to as *enterprise microblogging* or *internal micromessaging*.[47]

**MOBILE APPS**

The mobile app for Twitter helps you stay connected with your followers and the accounts you follow.

Many of the concepts of regular blogging apply to microblogging as well, although the severe length limitations call for a different approach to composition. Microblog messages often involve short summaries or teasers that provide links to more information. In addition, microblogs tend to have a stronger social aspect that makes it easier for writers and readers to forward messages and for communities to form around individual writers.[48]

The business communication uses of microblogging extend beyond the publication of brief updates.

Like regular blogging, microblogging quickly caught on with business users and is now a mainstream business medium. Microblogs are used for virtually all of the blog applications mentioned on pages 189–191. In addition, microblogs are often used for providing company updates, offering coupons and notice of sales, presenting tips on product usage, sharing relevant and interesting information from experts, announcing headlines of new blog posts, and serving as the *backchannel* in meetings and presentations (see page 373). By following top names in your field, you can customize Twitter as your own real-time news source.[49] Customer service is becoming a popular use for Twitter as well, thanks to its ease, speed, and the option of switching between public tweets and private direct messages as the

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**Twitter tips for beginners**

An experienced user shares tips for getting the most from Twitter. Go to **http://real-timeupdates.com/bce7**. Under "Students," click on "Learn More."

TABLE 6.2 **Tips for Effective Business Blogging**

| Tip | Why It's Important |
|---|---|
| Don't blog without a clear plan. | Without a clear plan, your blog is likely to wander from topic to topic and fail to build a sense of community with your audience. |
| Post frequently; the whole point of a blog is fresh material. | If you won't have a constant supply of new information or new links, create a traditional website instead. |
| Make it about your audience and the issues important to them. | Readers want to know how your blog will help them, entertain them, or give them a chance to communicate with others who have similar interests. |
| Write in an authentic voice; never create an artificial character who supposedly writes a blog. | Flogs, or fake blogs, violate the spirit of blogging, show disrespect for your audience, and will turn audiences against you as soon as they uncover the truth. Fake blogs used to promote products are now illegal in some countries. |
| Link generously—but carefully. | Providing interesting links to other blogs and websites is a fundamental aspect of blogging, but make sure the links will be of value to your readers and don't point to inappropriate material. |
| Keep it brief. | Most online readers don't have the patience to read lengthy reports. Rather than writing long, report-style posts, you can write brief posts that link to in-depth reports. |
| Don't post anything you wouldn't want the entire world to see. | Future employers, government regulators, competitors, journalists, and community critics are just a few of the people who might eventually see what you've written. |
| Minimize marketing and sales messages. | Readers want information about them and their needs. |
| Take time to write compelling, specific headlines for your postings. | Readers usually decide within a couple of seconds whether to read your postings; boring or vague headlines will turn them away instantly. |
| Pay attention to spelling, grammar, and mechanics. | No matter how smart or experienced you are, poor-quality writing undermines your credibility with intelligent audiences. |
| Respond to criticism openly and honestly. | Hiding sends the message that you don't have a valid response to the criticism. If your critics are wrong, patiently explain why you think they're wrong. If they are right, explain how you'll fix the situation. |
| Listen and learn. | If you don't take the time to analyze the comments people leave on your blog or the comments other bloggers make about you, you're missing out on one of the most valuable aspects of blogging. |
| Respect intellectual property. | Improperly using material you don't own is not only unethical but can be illegal as well. |
| Be scrupulously honest and careful with facts. | Honesty is an absolute requirement for every ethical business communicator, of course, but you need to be extra careful online because inaccuracies (both intentional and unintentional) are likely to be discovered quickly and shared widely. |
| If you review products on your blog, disclose any beneficial relationships you have with the companies that make those products. | Bloggers who receive free products or other compensation from companies whose products they write about are now required to disclose the nature of these relationships. |

situation warrants.[50] The social networking aspect of Twitter and other microblogs also makes them good for *crowdsourcing* research questions, asking ones' followers for input or advice.[51] Finally, the ease of *retweeting*, the practice of forwarding messages from other Twitter users, is the microblogging equivalent of sharing other content from other bloggers via content curation.

In addition to its usefulness as a stand-alone system, Twitter is also integrated with other social media systems and a variety of publishing and reading tools and services. Many of these system use the informal Twitter feature known as the *hashtag* (the # symbol followed by a word or phrase), which makes it easy for people to label and search for topics of interest and to monitor ongoing Twitter conversations about particular topics.

Don't let the speed and simplicity of microblogging lull you into making careless mistakes; every message should support your business communication objectives.

Although microblogs are designed to encourage spontaneous communication, when you're using the medium for business communication, don't just tweet out whatever pops into your head. Make sure messages are part of your overall communication strategy. Twitter followers consider tweets that are entertaining, surprising, informative, or engaging (such as asking followers for advice) as the most valuable. In contrast, the least-valuable tweets tend to be complaints, conversations between the Twitter account owner and a specific follower, and relatively pointless messages such as saying "good morning."[52]

## Podcasting

**7** LEARNING OBJECTIVE
Explain how to adapt the three-step writing process for podcasts.

**Podcasting** is the process of recording audio or video files and distributing them online via RSS subscriptions, in the same way that blog posts are automatically fed to subscribers. Podcasting combines the media richness of voice or visual communication with the convenience of portability. Audiences can listen or watch podcasts on a blog or website, or they can download them to phones or portable music players to consume on the go. Particularly with audio podcasts, the hands-off, eyes-off aspect makes them great for listening to while driving or exercising.

Podcasting can be used to deliver a wide range of audio and video messages.

The most obvious use of podcasting is to replace existing audio and video messages, such as one-way teleconferences in which a speaker provides information without expecting to engage in conversation with the listeners. Training is another good use of podcasting; you may have already taken a college course via podcasts. Podcasting is also a great way to offer free previews of seminars and training classes.[53] Many business writers and consultants use podcasting to build their personal brands and to enhance their other product and service offerings. You can find a wide selection on iTunes, many of which are free (go to the Podcasting section and select the Business category).

The three-step process adapts quite well to podcasting.

Although it might not seem obvious at first, the three-step writing process adapts quite nicely to podcasting. First, focus the planning step on analyzing the situation, gathering the information you'll need, and organizing your material. One vital planning step depends on whether you intend to create podcasts for limited use and distribution (such as a weekly audio update to your virtual team) or to create a **podcasting channel** with regular recordings on a consistent theme, designed for a wider public audience. As with planning a blog, if you intend to create a podcasting channel, be sure to think through the range of topics you want to address over time to verify that you have a sustainable purpose. If you bounce from one theme to another, you risk losing your audience.[54] Maintaining a consistent schedule is also important; listeners will stop paying attention if they can't count on regular updates.[55]

Steering devices such as transitions, previews, and reviews are vital in podcasts.

As you organize the content for a podcast, pay close attention to previews, transitions, and reviews. These steering devices are especially vital in audio recordings because audio lacks the "street signs" (such as headings) that audiences rely on in print media. Moreover, scanning back and forth to find specific parts of an audio or video message is much more difficult than with textual messages, so you need to do everything possible to make sure your audience successfully receives and interprets your message on the first try.

Plan your podcast content carefully; editing is more difficult with podcasts than with textual messages.

One of the attractions of podcasting is the conversational, person-to-person feel of the recordings, so unless you need to capture exact wording, speaking from an outline and notes rather than a prepared script is often the best choice. However, no one wants to listen to rambling podcasts that take several minutes to get to the topic or struggle to make a point, so don't try to make up your content on the fly. Effective podcasts, like effective stories, have a clear beginning, middle, and end.

The completing step is where podcasting differs most dramatically from written communication, for the obvious reason that you are recording and distributing audio or video files. Particularly for more formal podcasts, start by revising your script or thinking through your speaking notes before you begin to record. The closer you can get to recording your podcasts in one take, the more productive you'll be.

For basic podcasts, your computer and perhaps even your smartphone might have most of the hardware you already need, and you can download recording software.

Most personal computers, smartphones, and other devices now have basic audio recording capability, including built-in microphones, and free editing software such as Audacity is available online. These tools can be sufficient for creating informal podcasts for internal use, but to achieve the higher production quality expected in formal or public podcasts, you'll need additional pieces of hardware and software. These can include an audio processor (to filter out extraneous noise and otherwise improve the audio signal), a mixer (to combine multiple audio or video signals), a better microphone, more sophisticated recording and editing software, and perhaps some physical changes in your recording location to improve the acoustics.

Podcasts can be distributed in several ways, including through media stores such as iTunes, by dedicated podcast hosting services, or on a blog with content that supports the podcast channel. If you distribute your podcast on a blog, you can provide additional information and use the commenting feature of the blog to encourage feedback from your audience.[56]

For the latest information on using podcasts in business, visit http://real-timeupdates.com/bce7 and click on Chapter 6.

# Chapter Review and Activities

## Learning Objectives: Check Your Progress

**Objective 1: Identify the major digital channels used for brief business messages, and describe the nine compositional modes needed for digital media.**

Digital media for short business messages include social networks, information and content sharing websites, email, instant messaging (IM), text messaging, blogging and microblogging, and podcasting. The nine compositional modes are conversations, comments and critiques, orientations, summaries, reference materials, narratives, teasers, status updates and announcements, and tutorials.

**Objective 2: Describe the use of social networks in business communication.**

Businesses now use a variety of social networks, including well-known public networks such as Facebook and business-oriented networks such as LinkedIn, as well as specialized networks, single-company networks for customers, and internal employee-only networks. The business communication applications of social networks are important and diverse; major uses include collaborating, gathering market intelligence, recruiting employees, connecting with business partners, marketing, and fostering brand communities.

**Objective 3: Explain how companies and business professionals can use information and media sharing websites.**

User-generated content sites such as YouTube allow companies to host media items (such as videos) that customers and other stakeholders can view, comment on, and share. Content curation sites allow professionals and consumers with expertise or interest in a particular field to collect and republish material on a particular topic. Community Q&A sites give individuals the opportunity to build their personal brands by providing expertise, and they give companies the chance to address customer complaints and correct misinformation.

**Objective 4: Describe the evolving role of email in business communication, and explain how to adapt the three-step writing process to email messages.**

As the earliest widely available digital channel, email was applied to a broad range of communication tasks—some it was well suited for and some it wasn't. Over time, newer media such as instant messaging, blogs, and social networks have been taking over some of these tasks, but email remains a vital medium that is optimum for many private, short- to medium-length messages.

The three-step process adapts easily to email communication. One of the most important planning decisions in crafting email messages is making sure every message has a valuable purpose. Any key planning decision is to follow the chain of command in your organization; emailing over your boss's head is a good way to stir up resentment. When writing email messages, bear in mind that the expectations of writing quality and formality are higher in business email. Also, pay close attention to the wording of an email message's subject line; it often determines whether and when recipients open and read the message. Effective subject lines are both informative (concisely identifying what the message is about) and compelling (giving readers a reason to read the message). Completing email messages is straightforward. Proof and revise messages (particularly important ones), stick with a clean design, make use of the email signature feature, and make sure you distribute the message to the right people.

**Objective 5: Describe the business benefits of instant messaging (IM), and identify guidelines for effective IM in the workplace.**

The benefits of IM include its capability for rapid response to urgent messages, lower cost than phone calls and email, ability to mimic conversation more closely than email, and availability on a wide range of devices.

As with email, business IM needs to be treated as a professional medium to ensure safe and effective communication. Be courteous in your use of IM to avoid interrupting others unnecessarily. Make yourself unavailable when you need to focus on other work, refrain from sending confidential information if you're not on a secure system, refrain from sending personal messages at work, avoid using IM for lengthy and complex messages, avoid carrying on multiple IM conversations at once, avoid IM slang with anyone other than close colleagues, and follow security guidelines.

**Objective 6: Describe the use of blogging and microblogging in business communication, and briefly explain how to adapt the three-step process to blogging.**

Blogs are used in numerous ways in business today, such as for project management and team communication, company news, customer support, public relations and media relations, employee recruiting, policy and issue discussions, crisis communication, market research, brainstorming, employee engagement, viral marketing, influencing traditional media news coverage, and community building. Microblogs such as Twitter are used for many of the same purposes as conventional blogging, along with digital coupons, sale announcements, one-on-one customer service queries, and customized news channels created by following experts of interest. Microblogs can also serve as the backchannel during meetings and presentations.

The three-step process adapts readily to blogging. In planning, pay particular care to defining your audience, identifying the overall purpose of your blog and specific purposes of each post, and establishing a scope that is narrow enough to be focused but broad enough to afford a steady supply of topics. In writing, be sure to write in a personal, authentic style, without slipping into overly familiar or careless writing. Completing involves the usual tasks of proofing and revising, along with the particular tasks needed to distribute your posts via newsfeeds.

**Objective 7: Explain how to adapt the three-step writing process for podcasts.**

Although you record audio or video when creating podcasts rather than write messages, using the three-step process is an effective way to develop podcasts as well. Focus the planning step on analyzing the situation, gathering the information you'll need, and organizing your material. If you plan to create an ongoing podcast channel on a given theme, make sure you've identified a range of topics extensive enough to keep you going over time. As you organize and begin to think about the words or images you'll use as content, pay close attention to previews, transitions, and reviews so that audiences don't get lost while listening or watching. Finally, consider the necessary level of production quality; good-quality podcasts usually require some specialized hardware and software.

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## Test Your Knowledge

To review chapter content related to each question, refer to the indicated Learning Objective.

**6-1.** What are the situations in which a printed memo or letter might be preferable to a digital message? [LO-1]

**6-2.** What benefits do social networks offer in internal and external business communications? [LO-2]

**6-3.** Does the three-step writing process apply to IM? Why or why not? [LO-5]

## Apply Your Knowledge

To review chapter content related to each question, refer to the indicated Learning Objective.

**6-4.** Do you believe that a compositional medium such as a digital orientation is an effective guide in helping a newcomer find the right information sources in an organization? Why is expertise so important in writing an orientation? [LO-1]

**6-5.** Can your company remain in control of its messages if it stays off social media? Why or why not? [LO-2]

**6-6.** What purposes do community Q&A sites serve in building the reputation of a brand? [LO-3]

**6-7.** If one of the benefits of blogging is the personal, intimate style of writing, is it a good idea to limit your creativity by adhering to conventional rules of grammar, spelling, and mechanics? Why or why not? [LO-6]

**6-8.** What are some ways the president of a hiking equipment company could use Twitter to engage potential customers without being overtly promotional? [LO-6]

## Practice Your Skills

### Exercises for Perfecting Your Writing

To review chapter content related to each set of exercises, refer to the indicated Learning Objective.

**6-9. Planning: Creating an Audience Profile, Selecting Media [LO-1], Chapter 3** You are in charge of the "Save the Environment" campaign in your neighborhood, and it has recently received negative attention. Local communities have criticized its members for littering in the area, corporate sponsors are deciding to pull out, and your own team's motivation levels are falling. Keeping each support group in mind, how do you plan to respond? Which medium or media do you think would be most effective in conveying positive messages and regaining confidence among each target audience?

**6-10. Media Skills: Blogging [LO-6]** The members of the project team of which you are the leader have enthusiastically embraced blogging as a communication medium. Unfortunately, as emotions heat up during the project, some of the blog postings are getting too casual, too personal, and even sloppy. Because your boss and other managers around the company also read this project blog, you don't want the team to look unprofessional in anyone's eyes. Revise the following blog posting so that it communicates in a more businesslike manner while retaining the informal, conversational tone of a blog (be sure to correct any spelling and punctuation mistakes you find as well).

> Well, to the profound surprise of absolutely nobody, we are not going to be able meet the June 1 commitment to ship 100 operating tables to Southeast Surgical Supply. (For those of you who have been living in a cave the past six month, we have been fighting to get our hands on enough high-grade chromium steel to meet our production schedule.) Sure enough, we got news, this morning that we will only get enough for 30 tables. Yes, we look lik fools for not being able to follow through on promises we made to the customer, but no, this didn't have to happpen. Six month's ago, purchasing warned us about shrinking supplies and suggested we advance-buy as much as we would need for the next 12 months, or so. We naturally tried to followed their advice, but just as naturally were shot down by the bean counters at corporate who trotted out the policy about never buying more than three months worth of materials in advance. Of course, it'll be us–not the bean counters who'll take the flak when everybody starts asking why revenues are down next quarter and why Southeast is talking to our friends at Crighton Manuf!!! Maybe, some day this company will get its head out of the sand and realize that we need to have some financial flexibility in order to compete.

**Collaboration: Working in Teams; Planning: Selecting Media Chapter 2; [LO-1]** Working with at least two other students, identify the best medium to use for each of the following messages. For each of these message needs, choose a medium that you think would work effectively and explain your choice. (More than one medium could work in some cases; just be able to support your particular choice.)

**6-11.** A technical support service for people trying to use their digital music players

**6-12.** A message of condolence to the family of an employee who passed away recently

**6-13.** A collection of infographics from a variety of sources on the state of the consumer electronics industry

**6-14.** Competitive developments observed over the last six months

**6-15.** A series of messages, questions, and answers surrounding the work of a project team

**Media Skills: Writing Email Subject Lines** [LO-4] Using your imagination to make up whatever details you need, revise the following email subject lines to make them more informative:

**6-16.** New budget figures
**6-17.** Marketing brochure—your opinion
**6-18.** Production schedule

## Activities

Each activity is labeled according to the primary skill or skills you will need to use. To review relevant chapter content, you can refer to the indicated Learning Objective. In some instances, supporting information will be found in another chapter, as indicated.

**6-19. Media Skills: Email [LO-4].** The following email message contains numerous errors related to what you've learned about planning and writing business messages. First, list the flaws you find in this version. Then use the following steps to plan and write a better memo.

Kind attn.: Nikolas Stavrosky, HR Manager
<nstavrosky@aerocons.com>
SUBJECT: Friday dressing – Not Party dressing!!

It is appalling to observe employees coming to work on Fridays! The office does not bear the semblance of a workplace but rather of a weekend camp thanks to employees who dress inappropriately on Fridays. Casual Fridays is all about wearing smart casual attire in place of stuffy formal attire worn during the rest of the week. But people have been strolling in to work with frayed jeans, untucked shirts, tank tops, and even flip-flops. Let me remind you that Fridays are also working days, and the company continues to transact business and deal with customers in the office. It is imperative that employees uphold the image of the company as well as respect customers by dressing suitably. Customers have even remarked that our office looks like a nightclub on a Friday with a wide assortment of colors, designs, and accessories. Despite numerous warnings, many employees have paid little heed to the appropriateness of their attire on Fridays.

The management has proposed a set of Friday dressing rules that must be followed. Employees who do not abide by them will henceforth be asked to go back home, change into suitable attire, and return to the office. During this time, their absence from office will be flagged and will come up for review at the end of the year.

Please take this seriously!

Nikolas Stavrosky
Manager
Human Resources

First, describe the flaws you discovered in this email message. Next, develop a plan for rewriting the message. Use the following steps to organize your efforts before you begin writing:

- Determine the purpose.
- Identify and analyze your audience.
- Define the main idea.
- Outline the major supporting points.
- Choose between the direct and indirect approaches.

Now rewrite the email message. Don't forget to leave ample time for revision of your own work before you turn it in.

**6-20. Media Skills: Instant Messaging [LO-5]** Review the following IM exchange and explain how the customer service agent could have handled the situation more effectively.

AGENT: Thanks for contacting Home Exercise Equipment. What's up?
CUSTOMER: I'm having trouble assembling my home gym.
AGENT: I hear that a lot! LOL
CUSTOMER: So is it me or the gym?
AGENT: Well, let's see <g>. Where are you stuck?
CUSTOMER: The crossbar that connects the vertical pillars doesn't fit.
AGENT: What do you mean doesn't fit?
CUSTOMER: It doesn't fit. It's not long enough to reach across the pillars.
AGENT: Maybe you assembled the pillars in the wrong place. Or maybe we sent the wrong crossbar.
CUSTOMER: How do I tell?
AGENT: The parts aren't labeled so could be tough. Do you have a measuring tape? Tell me how long your crossbar is.

**6-21. Media Skills: Blogging [LO-6]** Read the following blog post and (a) analyze the strengths and weaknesses of each sentence and (b) revise it so that it follows the guidelines in this chapter.

[headline]

We're DOOMED!!!!!

[post]

I was at the Sikorsky plant in Stratford yesterday, just checking to see how things were going with the assembly line retrofit we did for them last year. I think I saw the future, and it ain't pretty. They were demo'ing a prototype robot from Motoman that absolutely blows our stuff out of the water. They wouldn't let me really see it, but based on the 10-second glimpse I got, it's smaller, faster, and more maneuverable than any of our units. And when I asked about the price, the guy just grinned. And it wasn't the sort of grin designed to make me feel good.

I've been saying for years that we need to pay more attention to size, speed, and maneuverability instead of just relying on our historical strengths of accuracy and payload capacity, and you'd have to be blind not to agree that this experience proves me right. If we can't at least show a design for a better unit within two or three months, Motoman is going to lock up the market and leave us utterly in the dust.

Believe me, being able to say "I told you so" right now is not nearly as satisfying as you might think!!

**6-22. Media Skills: Blogging [LO-5]** From what you've learned about planning and writing business messages, you should be able to identify numerous errors made by the writer of the following blog posting. List them below and then plan and write a better post, following the guidelines given.

[headline]

Get Ready!

[post]

We are hoping to be back at work soon, with everything running smoothly, same production schedule and no late projects or missed deadlines. So you need to clean out your desk, put your stuff in boxes, and clean off the walls. You can put the items you had up on your walls in boxes, also.

We have provided boxes. The move will happen this weekend. We'll be in our new offices when you arrive on Monday.

We will not be responsible for personal belongings during the≈move.

First, describe the flaws you discovered in this blog post. Next, develop a plan for rewriting the post. Use the following steps to organize your efforts before you begin writing:

- Determine the purpose.
- Identify and analyze your audience.
- Define the main idea.
- Outline the major supporting points.
- Choose between the direct and indirect approaches.

Now rewrite the post. Don't forget to leave ample time for revision of your own work before you turn it in.

**6-23. Media Skills: Microblogging [LO-6]** School alumni blogs are the best way for ex-students to stay in touch and post information on their current status. You've recently discovered that your school has created a blog for both past and current students to benefit one another from blog posts. As an active member of a charity organization, you view this blog as an opportunity to solicit monetary support for the organization from alumni members. Write a short text to be posted on the blog that is informative and appealing, but does not appear to be misusing the blog for your own pursuits. Would it be appropriate to link members to your charity's website or Twitter account?

**6-24. Media Skills: Podcasting [LO-7]** You've recently begun recording a weekly podcast to share information with your large and far-flung staff. After a month, you ask for feedback from several of your subordinates, and you're disappointed to learn that some people stopped listening to the podcast after the first couple weeks. Someone eventually admits that many staffers feel that the recordings are too long and rambling and that the information they contain isn't valuable enough to justify the time it takes to listen. You aren't pleased, but you want to improve. An assistant transcribes the introduction to last week's podcast so you can review it. You immediately see two problems. Revise the introduction based on what you've learned in this chapter.

So there I am, having lunch with Selma Gill, who just joined and took over the Northeast sales region from Jackson Stroud. In walks our beloved CEO with Selma's old boss at Uni-Plex; turns out they were finalizing a deal to co-brand our products and theirs and to set up a joint distribution program in all four domestic regions. Pretty funny, huh? Selma left Uni-Plex because she wanted sell our products instead, and now she's back selling her old stuff, too. Anyway, try to chat with her when you can; she knows the biz inside and out and probably can offer insight into just about any sales challenge you might be running up against. We'll post more info on the co-brand deal next week; should be a boost for all of us. Other than those two news items, the other big news this week is the change in commission reporting. I'll go into the details in minute, but when you log onto the intranet, you'll now see your sales results split out by product line and industry sector. Hope this helps you see where you're doing well and where you might beef things up a bit. Oh yeah, I almost forgot the most important bit. Speaking of our beloved CEO, Thomas is going to be our guest of honor, so to speak, at the quarterly sales meeting next week and wants an update on how petroleum prices are affecting customer behavior. Each district manager should be ready with a brief report. After I go through the commission reporting scheme, I'll outline what you need to prepare.

**6-25. Media Skills: Podcasting [LO-7]** To access this podcast exercise, visit **http://real-timeupdates.com/bce7**, click on Student Assignments, and select Chapter 6, Activity 7, and listen to this podcast. Identify at least three ways in which the podcast could be improved, and draft a brief email message you could send to the podcaster with your suggestions for improvement.

# Expand Your Skills

## Critique the Professionals

Locate the YouTube channel page of any company you find interesting and assess its social networking presence using the criteria for effective communication discussed in this chapter and your own experience using social media. What does this company do well with its YouTube channel? How might it improve? Using whatever medium your instructor requests, write a brief analysis of the company's YouTube presence (no more than one page), citing specific elements from the piece and support from the chapter.

## Sharpen Your Career Skills Online

Bovée and Thill's Business Communication Web Search, at **http://websearch.businesscommunicationnetwork.com**, is a unique research tool designed specifically for business communication research. Use the Web Search function to find a website, video, PDF document, podcast, or presentation that offers advice on using social media in business. Write a brief email message to your instructor or a post for your class blog, describing the item that you found and summarizing the career skills information you learned from it.

# Cases

Website links for selected companies mentioned in cases can be found in the Student Assignments section at http://real-timeupdates.com/bce7.

## SOCIAL NETWORKING SKILLS

**6-26. Media Skills: Social Networking; Media Skills: Microblogging [LO-2] [LO-6]** Foursquare is one of the leading providers of location-based social networking services. Millions of people use Foursquare for social engagement and friendly competition, and many business owners are starting to recognize the marketing potential of having people who are on the move in local areas broadcasting their locations and sharing information about stores, restaurants, clubs, and other merchants.

**Your task:** Review the information on Foursquare's Merchant Platform. Now write four brief messages, no more than 140 characters long (including spaces). The first should summarize the benefits to stores, restaurants, and other "brick and mortar" businesses of participating in Foursquare, and the next three messages should convey three compelling points that support that overall benefit statement. If your class is set up with private Twitter accounts, use your private account to send your messages. Otherwise, email your four messages to your instructor or post them on your class blog, as your instructor directs.

## SOCIAL NETWORKING SKILLS

**6-27. Media Skills: Social Networking; Online Etiquette [LO-2], Chapter 2** Employees who take pride in their work are a practically priceless resource for any business. However, pride can sometimes manifest itself in negative ways when employees come under criticism—and public criticism is a fact of life in social media. Imagine that your company has recently experienced a rash of product quality problems, and these problems have generated some unpleasant and occasionally unfair criticism on a variety of social media sites. Someone even set up a Facebook page specifically to give customers a place to vent their frustrations.

You and your public relations team jumped into action, responding to complaints with offers to provide replacement products and help customers who have been affected by the quality problems. Everything seemed to be going as well as could be expected, when you were checking a few industry blogs one evening and discovered that two engineers in your company's product design lab have been responding to complaints on their own. They identified themselves as company employees and defended their product design, blaming the company's production department and even criticizing several customers for lacking the skills needed to use such a sophisticated product. Within a matter of minutes, you see their harsh comments being retweeted and reposted on multiple sites, only fueling the fire of negative feedback against your firm. Needless to say, you are horrified.

**Your task:** You manage to reach the engineers by private message and tell them to stop posting messages, but you realize you have a serious training issue on your hands. Write a post for the internal company blog that advises employees on how to respond appropriately when they are representing the company online. Use your imagination to make up any details you need.

## SOCIAL NETWORKING SKILLS

**6-28. Media Skills: Social Networking [LO-2]** Social media can be a great way to, well, socialize during your college years, but employers are increasingly checking up on the online activities of potential hires to avoid bringing in employees who may reflect poorly on the company.

**Your task:** Team up with another student and review each other's public presence on Facebook, Twitter, Flickr, blogs, and any other website that an employer might check during the interview and recruiting process. Identify any photos, videos, messages, or other material that could raise a red flag when an employer is evaluating a job candidate. Write your teammate an email message that lists any risky material.

## EMAIL SKILLS/PORTFOLIO BUILDER

**6-29. Media Skills: Email [LO-4]** One-quarter of all motor vehicle accidents that involve children under age 12 are side-impact crashes—and these crashes result in higher rates of injuries and fatalities than those with front or rear impacts.

**Your task:** You work in the consumer information department at Britax, a leading manufacturer of car seats. Your manager has asked you to prepare an email message that can be sent out whenever parents request information about side-impact crashes and the safety features of Britax seats. Start by researching side-impact crashes on the Britax website. Write a three-paragraph message that explains the seriousness of side-impact crashes, describes how injuries and fatalities can be minimized in these crashes, and describes how Britax's car seats are designed to help protect children in side-impact crashes.[57]

## EMAIL SKILLS/MOBILE SKILLS

**6-30. Media Skills: Email [LO-4]** The size limitations of smartphone screens call for a different approach to writing (see page 141) and formatting (see page 162) documents.

**Your task:** On the website of any company that interests you, find a news release (some companies refer to them as *press releases*) that announces the launch of a new product. Using Pages or any other writing app at your disposal, revise and format the material in a way that would be effective on smartphone screens.

## IM SKILLS

**6-31. Media Skills: IM; Compositional Modes: Tutorials [LO-1] [LO-5]** High-definition television can be a joy to watch—but, oh, what a pain to buy. The field is cluttered with competing technologies and arcane terminology that is meaningless to most consumers. Moreover, it's nearly impossible to define one technical term without invoking two or three others, leaving consumers swimming in an alphanumeric soup of confusion. As a sales support manager for Crutchfield, a leading online retailer of audio and video systems, you understand the frustration buyers feel; your staff is deluged daily by their questions.

**Your task:** To help your staff respond quickly to consumers who ask questions via Crutchfield's online IM chat service, you are developing a set of "canned" responses to common questions. When a consumer asks one of these questions, a sales adviser can simply click on the ready-made answer. Research the "Research and DIY" section on the Crutchfield website, then write concise, consumer-friendly definitions of the following terms: *1080p*, *HDMI*, *4K*, and *3D TV*.

### BLOGGING SKILLS

**6-32. Media Skills: Blogging; Compositional Modes: Tutorials [LO-6]** Tumblr has become a popular "short-form" blogging platform by combining the simplicity of Twitter with the ability to share photos and other media easily.

**Your task:** Write a 300- to 400-word post for your class blog that explains how to set up an account on Tumblr and get involved in the Tumblr community. The help pages on Tumblr are a good place to get more information about the service.

### BLOGGING SKILLS

**6-33. Media Skills: Blogging [LO-6]** Credit card debt can be a crippling financial burden with myriad side effects, from higher insurance rates to more-expensive loans to difficulty getting a job or a promotion. Unfortunately, credit debt is also frighteningly easy to fall into, particularly for young people trying to get started in life with limited cash flow.

**Your task:** Write a three- to five-paragraph blog post that warns college students about the dangers of credit card debt. Be sure to credit the sources you find in your research.

### MICROBLOGGING SKILLS

**6-34. Media Skills: Microblogging; Compositional Modes: Summaries [LO-1] [LO-6]** A carefully constructed series of tweets can serve as a summary of a blog post, video, or other message or document.

**Your task:** Find any article, podcast, video, or webpage on a business topic that interests you. Write four to six tweetables that summarize the content of the piece. Restrict the first tweetable to 120 characters to allow for a URL. Email the series to your instructor or publish them on Twitter if your instructor directs. If you quote phrases from the original directly, be sure to put them in quotation marks.

### MICROBLOGGING SKILLS

**6-35. Media Skills: Microblogging; Compositional Modes: Teasers [LO-1] [LO-6]** Twitter updates are a great way to alert people to helpful articles, videos, and other online resources.

**Your task:** Find an online resource (it can be a website quiz, a YouTube video, a PowerPoint presentation, a newspaper article, or anything else appropriate) that offers some great tips to help college students prepare for job interviews. Write a teaser of no more than 120 characters that hints at the benefits other students can get from this resource. If your class is set up with private Twitter accounts, use your private account to send your message. Otherwise, email it to your instructor. Be sure to include the URL; if you're using a Twitter account, the system should shorten it to 20 characters to keep you within the 140-character limit.

### PODCASTING SKILLS/PORTFOLIO BUILDER

**6-36. Media Skills: Podcasting [LO-7]** While writing the many messages that are part of the job search process, you find yourself wishing you could just talk to some of these companies so your personality could shine through. Well, you've just gotten that opportunity. One of the companies you've applied to has emailed you back, asking you to submit a two-minute podcast introducing yourself and explaining why you would be a good person to hire.

**Your task:** Identify a company you'd like to work for after graduation and select a job that would be a good match for your skills and interests. Write a script for a two-minute podcast (two minutes represents roughly 250 words for most speakers). Introduce yourself and the position you're applying for, describe your background, and explain why you think you're a good candidate for the job. Make up any details you need. If your instructor asks you to do so, record the podcast and submit the audio file.

### PODCASTING SKILLS

**6-37. Media Skills: Podcasting [LO-7]** Between this chapter and your own experience as a user of social media, you know enough about social media to offer some insights to other business communicators.

**Your task:** Write a script for a two- to three-minute podcast (roughly 250 to 400 words) on any social media topic that you find compelling. Be sure to introduce your topic clearly in the introduction and provide helpful transitions along the way. If your instructor asks you to do so, record the podcast and submit the file electronically.

## Improve Your Grammar, Mechanics, and Usage

You can download the text of this assignment from **http://real-timeupdates.com/bce7**; click on Student Assignments and then click on Chapter 6. Improve Your Grammar, Mechanics, and Usage.

### Level 1: Self-Assessment—Prepositions and Conjunctions

Review Sections 1.6.1 and 1.6.2 in the Handbook of Grammar, Mechanics, and Usage and then complete the following 15 items.

Rewrite the following items, deleting unnecessary words and prepositions and adding required prepositions:

**6-38.** Where was your argument leading to?
**6-39.** I wish he would get off of the phone.

**6-40.** This is a project into which you can sink your teeth.

**6-41.** U.S. Mercantile must become aware and sensitive to its customers' concerns.

**6-42.** We are responsible for aircraft safety in the air, the hangars, and the runways.

In the following items, provide the missing preposition:

**6-43.** Dr. Namaguchi will be talking the marketing class, but she has no time for questions.

**6-44.** Matters like this are decided after thorough discussion all seven department managers.

**6-45.** We can't wait their decision much longer.

**6-46.** Their computer is similar ours.

**6-47.** This model is different the one we ordered.

In the following items, rewrite the sentences to make phrases parallel:

**6-48.** She is active in not only a civic group but also in an athletic organization.

**6-49.** That is either a mistake or was an intentional omission.

**6-50.** The question is whether to set up a booth at the convention or be hosting a hospitality suite.

**6-51.** We are doing better in both overall sales and in profits.

**6-52.** She had neither the preferred educational background, nor did she have suitable experience.

## Level 2: Workplace Applications

The following items may contain errors in grammar, capitalization, punctuation, abbreviation, number style, word division, and vocabulary. Rewrite each sentence, correcting all errors. If a sentence has no errors, write "Correct" for that number.

**6-53.** Peabody Energys commitment to environmental excellence is driven by the companies' mission statement which states that when mining is complete, the company will leave the land in a condition equal or better than it was before mining.

**6-54.** In 1998, Blockbuster opened a state of the art distribution center in McKinney, Texas, just North of the company's Dallas Headquarters.

**6-55.** Miss Tucci was responsible for developing Terraspring's business plan, establishing the brand, and for launching the company.

**6-56.** The principle goals of the new venture will be to offer tailored financial products and meeting the needs of the community.

**6-57.** Nestle Waters North America are the number one bottled water company in the U.S. and Canada.

**6-58.** The reason egg prices dropped sharply is because of a Post Easter reduction in demand.

**6-59.** Joining bank officials during the announcement of the program were U.S. congressman Luis V. Guitierrez, Carlos Manuel Sada Solana, General Consul of Mexico in the Midwest, and "Don Francisco", the leading hispanic entertainment figure in the United States and Latin America.

**6-60.** The summer advertising campaign is the most unique in 7-Eleven's history.

**6-61.** Upon introducing it's new Quadruple Fudge flavor, consumers are expected to flock to Baskin-Robbins ice cream parlors.

**6-62.** The signing of a Trade Pact between the european union and Chile, is being delayed by european negotiators who insist the deal includes an agreement requiring Chile to stop using the names Cognac, Champagne, and Burgundy.

**6-63.** Federal Trade commissioner, Mrs. Sheila F. Anthony called on the dietary supplement industry to institute better self regulation, and called on the media to refuse ads containing claims that are obviously false.

**6-64.** Founded in 1971, GSD&M has grown to become a nationally-acclaimed advertising agency with more than 500 employees and having billings of over $1 billion dollars.

**6-65.** Although marketing may seem to be the easier place to cut costs during a downturn its actually the last place you should look to make strategic cuts.

**6-66.** After closing their plant in Mecosta county, Green Mountain will have less than 200 employees.

**6-67.** The purchasing needs of professional's differ from blue collar workers.

## Level 3: Document Critique

The following document may contain errors in grammar, capitalization, punctuation, abbreviation, number style, word division, and vocabulary. As your instructor indicates, photocopy this page and correct all errors using standard proofreading marks (see Appendix C) or download the document and make the corrections in your word-processing software.

TO: George Kimball <g.kimball@sprenco.com>
SUBJECT: My trip back East

Dear George:

I went back to New York for apresentation the 15th of this month and I found it very informative. The sponsor of my visat was Vern Grouper. Vern is the Manager of IS at headquarters; that is, their centralized information systems operation. They've got quite a bit of power out there. And they do encourage us to utilize their capibilities, there services, and experiences to whatever extent will be beneficial to us. However, you could say it would be my observation that although they have a tremendous amount of computing capability that capability is directed toward a business dimension very different than ours and unlike anything we have. However, their are certain services that might be performed in our behalf by headquarters. For example, we could utilize people such as Vern to come and address our IS advisory group since I am planning on convening that group on a monthly basis.

By the way, I need to talk to you about the IS advicory group when you get a chance. I have 1 or 2 thoughts about some new approaches we can take with it I'd like to run by you if you don't mind. Its not too complicated just some simple ideas.

Let me know what you think of this idea about Vern coming here. If you like it than I will go ahead and set things in motion with Vern.

Sincerely,
John

MyBCommLab

Go to **mybcommlab.com** for the following Assisted-graded writing questions:

**6-68.** How can businesses make use of social networks such as Facebook for business communication? [LO-2]

**6-69.** Why does a personal style of writing help blogs build stronger relationships with audiences? [LO-6]

## Endnotes

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# 7 Writing Routine and Positive Messages

## LEARNING OBJECTIVES

After studying this chapter, you will be able to

1. Outline an effective strategy for writing routine business requests
2. Describe three common types of routine requests
3. Outline an effective strategy for writing routine replies and positive messages
4. Describe six common types of routine replies and positive messages



## Communication Matters . . .

"To succeed, I don't need to be Shakespeare; I must, though, have a sincere desire to inform."
—Warren Buffett, legendary investor and chairman of Berkshire Hathaway

Warren Buffett's financial acumen has made him and many of his shareholders wealthy, but he is recognized almost as widely for his communication skills. His letters, essays, and annual reports communicate complex financial topics in simple language his readers can easily understand. His approach is simple: Even for a document that will be read by thousands of people, he visualizes a single person (often one of his sisters) as his audience. He treats this audience member as an intelligent human being, but as someone who doesn't have the same level of experience with the subject matter he has. From there, he proceeds to organize and write his messages in a way that clarifies all the essential information and doesn't try to impress or obscure with complicated language.[1] Whether you're posting a status update on a team blog or producing a report for an audience of thousands, Buffett's approach is a great example to follow.

Louis Lanzano/Associated Press

Warren Buffett often deals with complex financial issues in his line of business, but he has cultivated the ability to express even complicated subjects in clear, simple language that seeks to inform rather than to impress.

# Strategy for Routine Requests

1 LEARNING OBJECTIVE
Outline an effective strategy for writing routine business requests.

Much of your daily business communication will involve routine and positive messages, including routine requests for information or action, replies on routine business matters, and positive messages such as good-news announcements and goodwill messages, from product operation hints and technical support to refunds and ordering glitches. These messages are the focus of this chapter. Chapter 8 covers messages in which you convey negative information, and Chapter 9 addresses persuasive messages.

Making requests is a routine part of business. In most cases, your audience will be prepared to comply, as long as you're not being unreasonable or asking people to do something they would expect you to do yourself. By applying a clear strategy and tailoring your approach to each situation, you'll be able to generate effective requests quickly.

For routine requests and positive messages,
- State the request or main idea
- Give necessary details
- Close with a cordial request for specific action

Like all other business messages, routine requests have three parts: an opening, a body, and a close. Using the direct approach, open with your main idea, which is a clear statement of your request. Use the body to give details and justify your request, then close by requesting specific action.

## STATING YOUR REQUEST UP FRONT

Take care that your direct approach doesn't come across as abrupt or tactless.

With routine requests, you can make your request at the beginning of the message. Of course, getting right to the point should not be interpreted as license to be abrupt or tactless:

- **Pay attention to tone.** Instead of demanding action ("Send me the latest version of the budget spreadsheet"), show respect by using words such as *please* and *I would appreciate*.
- **Assume that your audience will comply.** Because the request is routine, you can generally assume that your readers will comply when they clearly understand the reason for your request.
- **Be specific.** State precisely what you want. For example, if you request the latest market data from your research department, be sure to say whether you want a 1-page summary or 100 pages of raw data.

## EXPLAINING AND JUSTIFYING YOUR REQUEST

If you have multiple requests or questions, start with the most important one.

Use the body of your message to explain your request, as needed. Make the explanation a smooth and logical outgrowth of your opening remarks. If complying with the request could benefit the reader, be sure to mention that. If you have multiple requests or questions, ask the most important questions first and deal with only one topic per question. If you have an unusual or complex request, break it down into specific, individual questions so that the reader can address each one separately. This consideration not only shows respect for your audience's time but also gets you a more accurate answer in less time.

## REQUESTING SPECIFIC ACTION IN A COURTEOUS CLOSE

Close request messages with
- A request for some specific action
- Information about how you can be reached
- An expression of appreciation

Close your message with three important elements: (1) a specific request that includes any relevant deadlines, (2) information about how you can be reached (if it isn't obvious), and (3) an expression of appreciation or goodwill; for example: "Please send the figures by April 5 so that I can return first-quarter results to you before the April 15 board meeting. I appreciate your help." Conclude your message with a sincere thanks. However, don't thank the reader "in advance" for cooperating; many people find that presumptuous.

# Common Examples of Routine Requests

2 LEARNING OBJECTIVE
Describe three common types of routine requests.

The most common types of routine messages are asking for information or action, asking for recommendations, and making claims and requesting adjustments.

## ASKING FOR INFORMATION OR ACTION

Routine requests can have up to three basic elements:

- What you want to know or what you want your readers to do
- Why you're making the request (not required in all cases)
- Why it may be in your readers' interest to help you (not applicable in all cases)

For simple requests, using the direct approach gets the job done with a minimum of fuss. In more complex situations, you may need to provide more extensive reasons and justification for your request. If applicable, point out any benefits to the reader of complying with your request. Naturally, be sure to adapt your request to your audience and the situation (see Figure 7.1 on the next page).

Routine requests can be handled with simple, straightforward messages, but more complicated requests can require additional justification and explanation.

## ASKING FOR RECOMMENDATIONS

The need to inquire about people arises often in business. For example, before extending credit or awarding contracts, jobs, promotions, or scholarships, companies often ask applicants to supply references. Companies ask applicants to list references who can vouch for their ability, skills, integrity, character, and fitness for the job. Before you volunteer someone's name as a reference, ask permission to do so. Some people don't want you to use their names, perhaps because they don't know enough about you to feel comfortable writing a letter or because they or their employers have a policy of not providing recommendations.

Always ask for permission before using someone as a reference.

Requests for recommendations and references are routine, so you can organize your inquiry using the direct approach. Open your message by clearly stating why the recommendation is required (if it's not for a job, be sure to explain its purpose) and that you would like your reader to write the letter. If you haven't had contact with the person for some time, use the opening to trigger the reader's memory of the relationship you had, the dates of association, and any special events or accomplishments that might bring a clear and favorable picture of you to mind.

Refresh the memory of any potential reference you haven't been in touch with for a while.

Use the body of the request to list all the information the recipient would need to write the recommendation, including the full name and address or email address of the person to whom the recommendation should be sent. Consider including an updated résumé if you've had significant career advancement since your last contact.

Close your message with an expression of appreciation. When asking for an immediate recommendation, you should also mention the deadline. If you are requesting a printed letter, always be sure to enclose a stamped, preaddressed envelope as a convenience to the other party. Figure 7.2 on page 209 provides an example of a request that follows these guidelines.

**REAL-TIME UPDATES**
LEARN MORE BY VISITING THIS WEBSITE

**Asking for recommendations on LinkedIn**

Follow LinkedIn's advice for requesting a recommendation. Go to **http://real-timeupdates.com/bce7.** Under "Students," click on "Learn More."

## MAKING CLAIMS AND REQUESTING ADJUSTMENTS

If you're dissatisfied with a company's product or service, you can opt to make a **claim** (a formal complaint) or request an **adjustment** (a settlement of a claim). In either case, it's important to maintain a professional tone in all your communication, no matter how angry or frustrated you are. Keeping your cool will help you get the situation resolved sooner.

When writing a claim or requesting an adjustment
- Explain the problem and give details
- Provide backup information
- Request specific action

Open with a clear and calm statement of the problem along with your request. In the body, give a complete, specific explanation of the details. Provide any information the recipient needs to verify your complaint. In your close, politely request specific action or convey a sincere desire to find a solution. And, if appropriate, suggest that the business relationship will continue if the problem is solved satisfactorily. Be prepared to back up your claim with invoices, sales receipts, canceled checks, dated correspondence, and any other relevant documents. Send copies and keep the originals for your files.

Be prepared to document any claims you make with a company. Send copies and keep the original documents.

If the remedy is obvious, tell your reader exactly what you expect from the company, such as exchanging incorrectly shipped merchandise for the right item or issuing a refund

## 1 Plan →

**Analyze the Situation**
Verify that the purpose is to request information from company managers.

**Gather Information**
Gather accurate, complete information about local competitive threats.

**Choose Medium and Channel**
Email is effective for this nternal message, and it allows the attachment of a Word document to collect the information.

**Organize the Information**
Clarify that the main idea is collecting information that will lead to a better competitive strategy, which will in turn help the various district managers.

## 2 Write →

**Adapt to Your Audience**
Show sensitivity to audience needs with a "you" attitude, politeness, positive emphasis, and bias-free language. The writer already has credibility, as manager of the department.

**Compose the Message**
Maintain a style that is conversational but still businesslike, using plain English and appropriate voice.

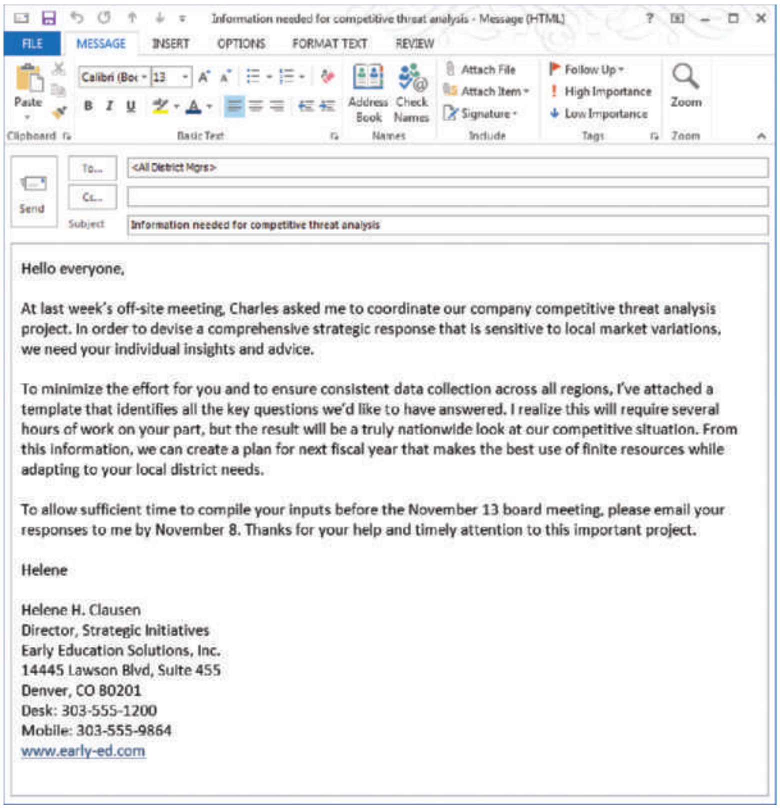
## 3 Complete

**Revise the Message**
Evaluate content and review readability; avoid unnecessary details.

**Produce the Message**
Simple email format is all the design this message needs.

**Proofread the Message**
Review for errors in layout, spelling, and mechanics.

**Distribute the Message**
Deliver the message via the company's email system.



To... <All District Mgrs>
Cc...
Subject Information needed for competitive threat analysis

Hello everyone,

At last week's off-site meeting, Charles asked me to coordinate our company competitive threat analysis project. In order to devise a comprehensive strategic response that is sensitive to local market variations, we need your individual insights and advice.

To minimize the effort for you and to ensure consistent data collection across all regions, I've attached a template that identifies all the key questions we'd like to have answered. I realize this will require several hours of work on your part, but the result will be a truly nationwide look at our competitive situation. From this information, we can create a plan for next fiscal year that makes the best use of finite resources while adapting to your local district needs.

To allow sufficient time to compile your inputs before the November 13 board meeting, please email your responses to me by November 8. Thanks for your help and timely attention to this important project.

Helene

Helene H. Clausen
Director, Strategic Initiatives
Early Education Solutions, Inc.
14445 Lawson Blvd, Suite 455
Denver, CO 80201
Desk: 303-555-1200
Mobile: 303-555-9864
www.early-ed.com

**Figure 7.1 Routine Message Requesting Action**
In this email request to district managers across the country, Helene Clausen asks them to fill out an attached information collection form. Although the request is not unusual and responding to it is part of the managers' responsibility, Clausen asks for their help in a courteous manner and points out the benefits of responding.
*Source:* Microsoft Outlook 2013, Microsoft Corporation.

**1 Plan →**

**Analyze the Situation**
Verify that the purpose is to request a recommendation letter from a college professor.

**Gather Information**
Gather information on classes and dates to help the reader recall you and to clarify the position you seek.

**Choose Medium and Channel**
The letter format gives this message an appropriate level of formality, although many professors prefer to be contacted by email.

**Organize the Information**
Messages like this are common and expected, so a direct approach is fine.

**2 Write →**

**Adapt to Your Audience**
Show sensitivity to audience needs with a "you" attitude, politeness, positive emphasis, and bias-free language.

**Compose the Message**
Style is respectful and businesslike, while still using plain English and appropriate voice.

**3 Complete**

**Revise the Message**
Evaluate content and review readability; avoid unnecessary details.

**Produce the Message**
Simple letter format is all the design this message needs.

**Proofread the Message**
Review for errors in layout, spelling, and mechanics.

**Distribute the Message**
Deliver the message via postal mail or email if you have the professor's email address.

1181 Ashport Drive
Tate Springs, TN 38101
March 14, 2015

Professor Lyndon Kenton
School of Business
University of Tennessee, Knoxville
Knoxville, TN 37916

Dear Professor Kenton:

I recently interviewed with Strategic Investments and have been called for a second interview for their Analyst Training Program (ATP). They have requested at least one recommendation from a professor, and I immediately thought of you. May I have a letter of recommendation from you?

The opening states the purpose of the letter and makes the request, assuming the reader will want to comply with the request.

Tucker includes information near the opening to refresh her professor's memory.

As you may recall, I took BUS 485, Financial Analysis, from you in the fall of 2013. I enjoyed the class and finished the term with an "A." Professor Kenton, your comments on assertiveness and cold-calling impressed me beyond the scope of the actual course material. In fact, taking your course helped me decide on a future as a financial analyst.

My enclosed résumé includes all my relevant work experience and volunteer activities. I would also like to add that I've handled the financial planning for our family since my father passed away several years ago. Although I initially learned by trial and error, I have increasingly applied my business training in deciding what stocks or bonds to trade. This, I believe, has given me a practical edge over others who may be applying for the same job.

The body refers to the enclosed résumé and mentions experience that could set the applicant apart from other candidates—information the professor could use in writing the recommendation.

She provides a deadline for response and includes information about the person who is expecting the recommendation.

If possible, Ms. Blackmon in Human Resources needs to receive your letter by March 30. For your convenience, I've enclosed a preaddressed, stamped envelope.

I appreciate your time and effort in writing this letter of recommendation for me. It will be great to put my education to work, and I'll keep you informed of my progress. Thank you for your consideration in this matter.

The close mentions the preaddressed, stamped envelope to encourage a timely response.

Sincerely,

Joanne Tucker

Joanne Tucker

Enclosure

**Figure 7.2 Effective Request for a Recommendation**
This writer uses a direct approach when asking for a recommendation from a former professor. Note how she takes care to refresh the professor's memory because she took the class a year and a half ago. She also indicates the date by which the letter is needed and points to the enclosure of a stamped, preaddressed envelope.

MOBILE APPS

If your email service doesn't allow huge file attachments, Hightail lets you post the file on its servers and send your recipients a link instead.

if the item is out of stock. In some cases, you might ask the recipient to resolve a problem. However, if you're uncertain about the precise nature of the trouble, you could ask the company to make an assessment and then advise you on how the situation could be fixed. Supply your contact information so that the company can discuss the situation with you, if necessary. Compare the poor and improved versions in Figure 7.3.

# Strategy for Routine Replies and Positive Messages

3 LEARNING OBJECTIVE Outline an effective strategy for writing routine replies and positive messages.

Just as you'll make numerous requests for information and action throughout your career, you'll also respond to similar requests from other people. When you are responding positively to a request, sending routine announcements, or sending a positive or goodwill message, you have several goals: to communicate the information or the good news, answer all questions, provide all required details, and leave your reader with a good impression of you and your firm.

Use a direct approach for routine replies and positive messages.

With the direct approach, open with a clear and concise expression of the main idea or good news.

Readers receiving routine replies and positive messages will generally be interested in what you have to say, so use the direct approach. Place your main idea (the positive reply or the good news) in the opening. Use the body to explain all the relevant details, and close cordially, perhaps highlighting a benefit to your reader.

## STARTING WITH THE MAIN IDEA

By opening with the main idea or good news, you prepare your audience for the details that follow. Make your opening clear and concise. Although the following introductory statements make the same point, one is cluttered with unnecessary information that buries the purpose, whereas the other is brief and to the point:

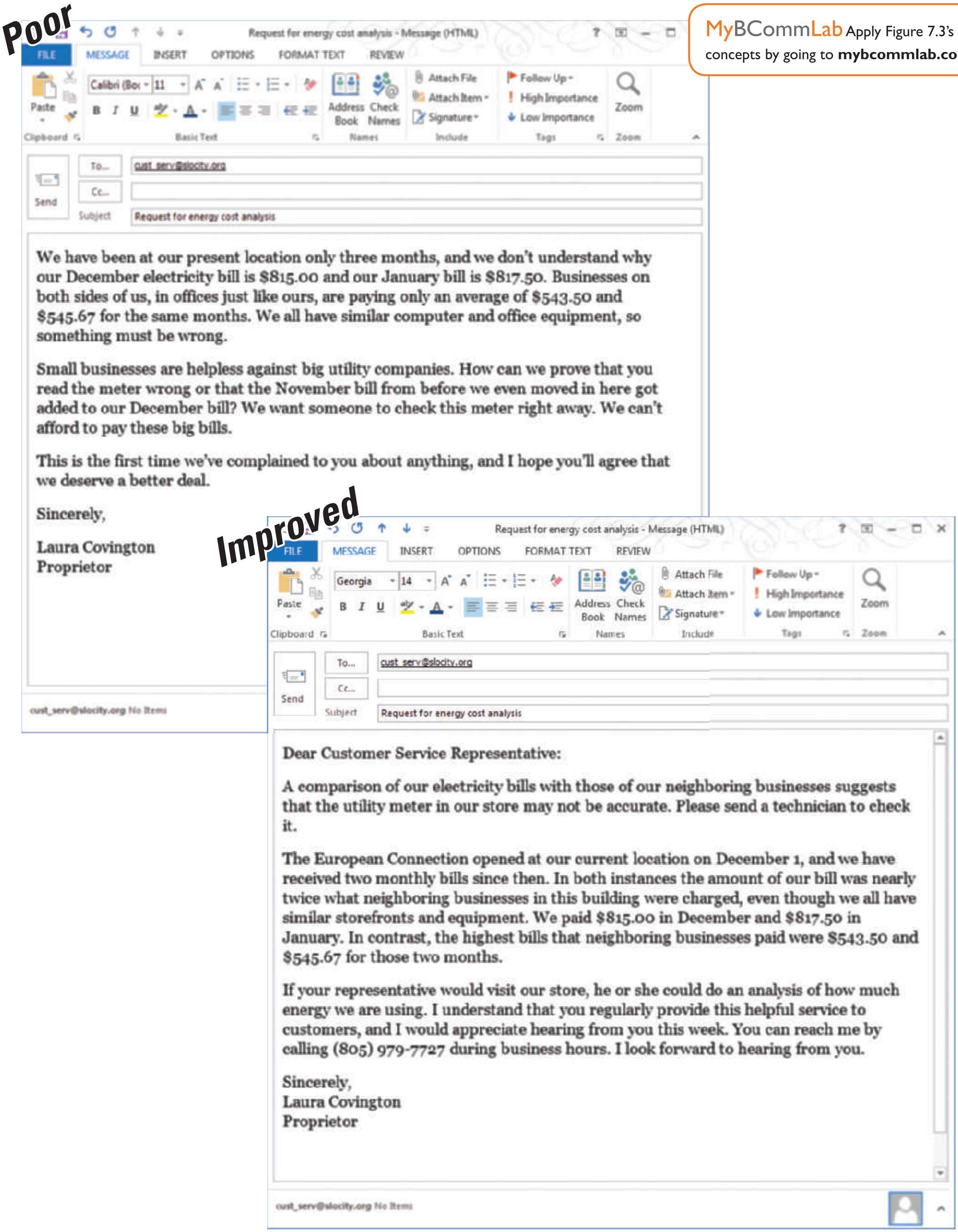
| Instead of This | Write This |
|---|---|
| I am pleased to inform you that after careful consideration of a diverse and talented pool of applicants, each of whom did a thorough job of analyzing Trask Horton Pharmaceuticals's training needs, we have selected your bid. | Trask Horton Pharmaceuticals has accepted your bid to provide public speaking and presentation training to the sales staff. |

The best way to write a clear opening is to have a clear idea of what you want to say. Before you begin, ask yourself, "What is the single most important message I have for the audience?"

## PROVIDING NECESSARY DETAILS AND EXPLANATION

Use the body to expand on the opening message so that readers get all the information they need. As you provide the details, maintain the supportive tone established in the opening. This tone is easy to continue when your message is entirely positive, as in this example:

> Your educational background and internship have impressed us, and we believe you would be a valuable addition to Green Valley Properties. As discussed during your interview, your salary will be $4,300 per month, plus benefits. In that regard, you will meet with our benefits manager, Paula Sanchez, at 8 a.m. on Monday, March 21. She will assist you with all the paperwork necessary to tailor our benefit package to your family situation. She will also arrange various orientation activities to help you acclimate to our company.


Poor

Request for energy cost analysis - Message (HTML)

To... cust_serv@slocity.org

Subject: Request for energy cost analysis

We have been at our present location only three months, and we don't understand why our December electricity bill is $815.00 and our January bill is $817.50. Businesses on both sides of us, in offices just like ours, are paying only an average of $543.50 and $545.67 for the same months. We all have similar computer and office equipment, so something must be wrong.

Small businesses are helpless against big utility companies. How can we prove that you read the meter wrong or that the November bill from before we even moved in here got added to our December bill? We want someone to check this meter right away. We can't afford to pay these big bills.

This is the first time we've complained to you about anything, and I hope you'll agree that we deserve a better deal.

Sincerely,

Laura Covington
Proprietor

Improved

Request for energy cost analysis - Message (HTML)

To... cust_serv@slocity.org

Subject: Request for energy cost analysis

Dear Customer Service Representative:

A comparison of our electricity bills with those of our neighboring businesses suggests that the utility meter in our store may not be accurate. Please send a technician to check it.

The European Connection opened at our current location on December 1, and we have received two monthly bills since then. In both instances the amount of our bill was nearly twice what neighboring businesses in this building were charged, even though we all have similar storefronts and equipment. We paid $815.00 in December and $817.50 in January. In contrast, the highest bills that neighboring businesses paid were $543.50 and $545.67 for those two months.

If your representative would visit our store, he or she could do an analysis of how much energy we are using. I understand that you regularly provide this helpful service to customers, and I would appreciate hearing from you this week. You can reach me by calling (805) 979-7727 during business hours. I look forward to hearing from you.

Sincerely,
Laura Covington
Proprietor

**Figure 7.3 Poor and Improved Versions of a Claim**

Note the difference in both tone and information content in these two versions. The poor version is emotional and unprofessional, whereas the improved version communicates calmly and clearly.

*Source:* Microsoft Office 2013, Microsoft Corporation.

Try to embed any negative information in a positive context.

However, if your routine message is mixed and must convey mildly disappointing information, put the negative portion of your message into as favorable a context as possible:

| Instead of This | Write This |
|---|---|
| No, we no longer carry the Sportsgirl line of sweaters. | The new Olympic line has replaced the Sportsgirl sweaters you asked about. Olympic features a wider range of colors and sizes and more contemporary styling. |

The more complete description is less negative and emphasizes how the audience can benefit from the change. However, if the negative news is likely to be a shock or particularly unpleasant for the reader, you'll want to use the indirect approach (discussed in Chapter 8).

### ENDING WITH A COURTEOUS CLOSE

In the close, make sure audience members understand what to do next and how that action will benefit them (if applicable).

The close of routine replies and positive messages is usually short and simple, because you're leaving things on a neutral or positive note and not usually asking for the reader to do anything. Often, a simple thank you is all you need. However, if follow-up action is required or expected, use the close to identify who will do what and when that action will take place.

## Common Examples of Routine Replies and Positive Messages

4 LEARNING OBJECTIVE Describe six common types of routine replies and positive messages.

Most routine and positive messages fall into six categories: answers to routine requests, grants of claims and requests for adjustment, recommendations, routine informational messages, good-news announcements, and goodwill messages.

### ANSWERING REQUESTS FOR INFORMATION OR ACTION

Every professional answers requests for information or action from time to time. If the response is straightforward, the direct approach is appropriate. A prompt, gracious, and thorough response will positively influence how people think about you and the organization you represent. When you're answering requests from a potential customer or other decision maker, look for subtle and respectful ways to encourage a decision in your favor.

### GRANTING CLAIMS AND REQUESTS FOR ADJUSTMENT

Responding to mistakes in a courteous, reader-focused way helps repair important business relationships.

Even the best-run companies make mistakes, and each of these events represents a turning point in your relationship with your customer. If you handle the situation well, your customer is likely to be even more loyal than before because you've proven that you're serious about customer satisfaction. However, if a customer believes that you mishandled a complaint, you'll make the situation even worse. Dissatisfied customers often take their business elsewhere without notice and tell numerous friends and colleagues about the negative experience. A transaction that might be worth only a few dollars by itself could cost you many times that amount in lost business. In other words, every mistake is an opportunity to improve a relationship.

Your specific response to a customer complaint depends on your company's policies for resolving such issues and your assessment of whether the company, the customer, or some third party is at fault. In general, take the following steps:

- Acknowledge receipt of the customer's claim or complaint.
- Sympathize with the customer's inconvenience or frustration.
- Take (or assign) personal responsibility for setting matters straight.
- Explain precisely how you have resolved, or plan to resolve, the situation.
- Take steps to repair the relationship.
- Follow up to verify that your response was correct.

In addition to taking these positive steps, maintain a professional demeanor. Don't blame colleagues by name; don't make exaggerated, insincere apologies; don't imply that the customer is at fault; and don't promise more than you can deliver.

Communication about a claim is a delicate matter when the customer is clearly at fault. If you choose to grant the claim, open with that good news. However, the body needs special attention because you want to discourage similar claims in the future. Close in a courteous manner that expresses your appreciation for the customer's business (see Figure 7.4 on the next page).

To grant a claim when the customer is at fault, try to discourage future mistakes without insulting the customer.

## PROVIDING RECOMMENDATIONS AND REFERENCES

Recommendation letters are vulnerable to legal complications, so consult your company's legal department before writing one.

People who need endorsements from employers or colleagues (when applying for a job, for example) often request letters of recommendation. These messages used to be a fairly routine matter, but employment recommendations and references have raised some complex legal issues in recent years. Employees have sued employers and individual managers for providing negative information or refusing to provide letters of recommendation, and employers have sued other employers for failing to disclose negative information about job candidates. Before you write a letter of recommendation for a former employee or provide information in response to another employer's background check, make sure you understand your company's policies. Your company may refuse to provide anything more than dates of employment and other basic details, for example.[2]

If you decide to write a letter of recommendation or respond to a request for information about a job candidate, your goal is to convince readers that the person being recommended has the characteristics necessary for the job, assignment, or other objective the person is seeking. A successful recommendation letter contains a number of relevant details (see Figure 7.5 on page 215):

- The candidate's full name
- The position or other objective the candidate is seeking
- The nature of your relationship with the candidate
- Facts and evidence relevant to the candidate and the opportunity
- A comparison of this candidate's potential with that of peers, if available (for example, "Ms. Jonasson consistently ranked in the top 10 percent of our national salesforce.")
- Your overall evaluation of the candidate's suitability for the opportunity

**REAL-TIME UPDATES**

LEARN MORE BY VISITING THIS WEBSITE

**Get expert tips on writing (or requesting) a letter of recommendation**

Find helpful advice on employment recommendations, academic recommendations, and character references. Go to **http://real-timeupdates.com/bce7.** Under "Students," click on "Learn More."

## SHARING ROUTINE INFORMATION

Many messages involve sharing routine information, such as project updates and order status notifications. Use the opening of these routine messages to state the purpose and briefly mention the nature of the information you are providing. Provide the necessary details in the body and end your message with a courteous close.

When sharing routine information
- State the purpose at the beginning and briefly mention the nature of the information you are providing
- Provide the necessary details
- End with a courteous close

Most routine communications are neutral, so you don't have to take special steps in anticipation of emotional reactions from readers. However, some routine informative messages may require additional care. For instance, policy statements or procedural changes may be good news for a company, perhaps by saving money. However, it may not be obvious to employees that such savings may make additional employee resources available or even lead to pay raises. In instances in which the reader may not initially view the information positively, use the body of the message to highlight the potential benefits from the reader's perspective. (For situations in which negative news will have a profound effect on the recipients, consider the indirect techniques discussed in Chapter 8.)

## ANNOUNCING GOOD NEWS

To develop and maintain good relationships, smart companies recognize that it's good business to spread the word about positive developments. Such developments can include opening new facilities, hiring a top executive, introducing new products or services,

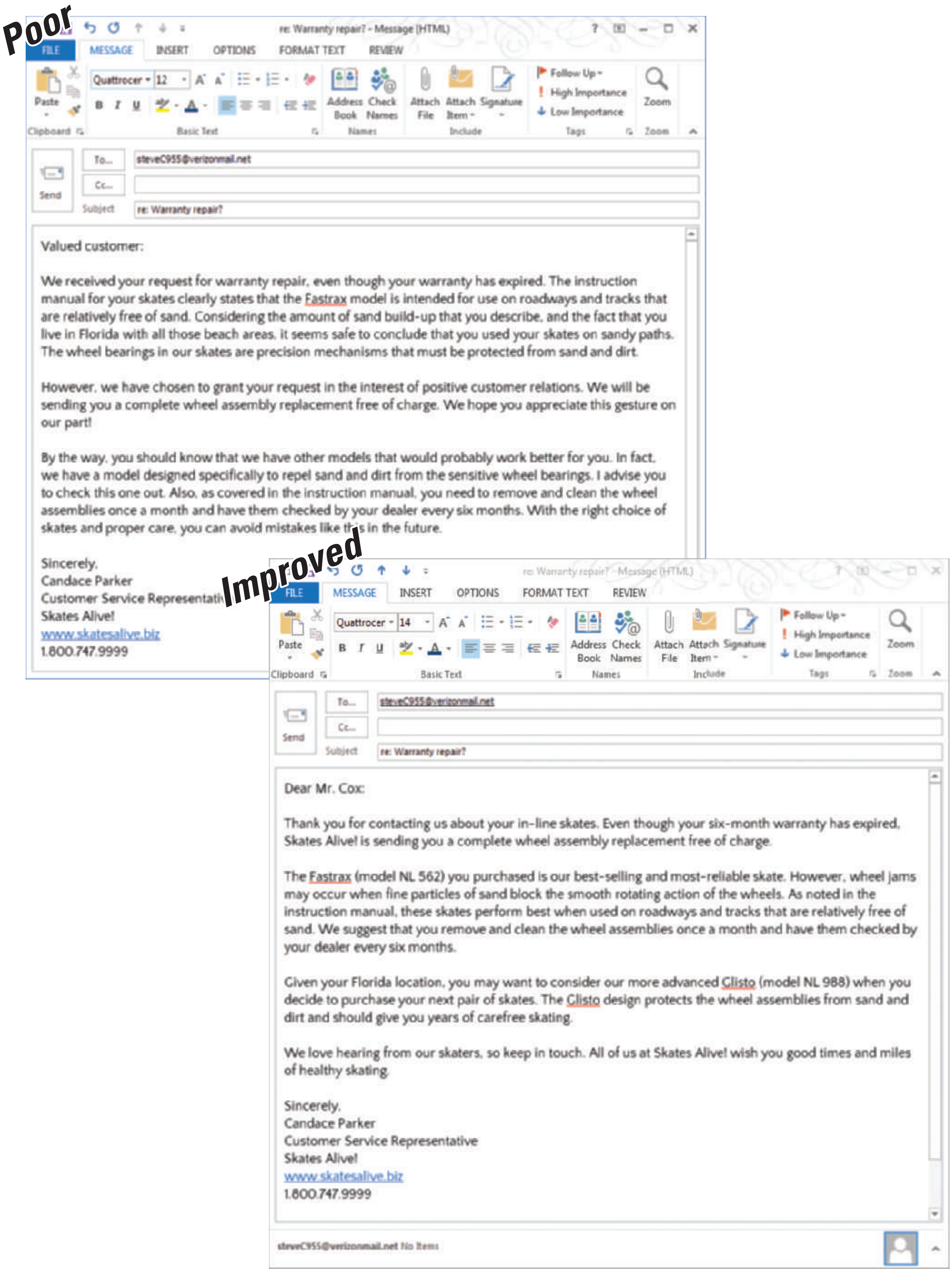



**Figure 7.4 Responding to a Claim When the Buyer Is at Fault**

Responding to a claim when the buyer is at fault is a positive gesture, so the content and tone of the message need to reflect that. After all, there's no point in fostering a positive relationship through actions but then undermining that through negative communication. Notice how the poor version sounds like a crabby parent who gives in to a child's demand but sends a mixed message by being highly critical anyway. The improved version is much more subtle, letting the customer know how to take care of his skates, without blaming or insulting him.

*Source:* Microsoft Office 2013, Microsoft Corporation.

**Point1 Promotions**

105 E. Madison
Ann Arbor, MI 48103
tel: 800-747-9786
e-mail: info@point1promo.net
www.point1promo.net

November 14, 2015

Ms. Clarice Gailey
Director of Operations
McNally and Associates, Inc.
8688 Southgate Ave.
Augusta, GA 30906

Dear Ms. Gailey:

I am pleased to recommend Talvin Biswas for the marketing position at McNally and Associates. Mr. Biswas has worked with Point1 Promotions as an intern for the past two summers while working toward his degree in marketing and advertising. His duties included customer correspondence, web content updates, and direct-mail campaign planning.

As his supervisor, in addition to knowing his work here, I also know that Mr. Biswas has served as secretary for the International Business Association at the University of Michigan. He tutored other international students in the university's writing center. His fluency in three languages (English, French, and Hindi) and thorough knowledge of other cultures will make him an immediate contributor to your international operations.

Mr. Biswas is a thoughtful and careful professional who will not hesitate to contribute ideas when invited to do so. In addition, because Mr. Biswas learns quickly, he will learn your company's routine with ease.

Mr. Biswas will make an excellent addition to your staff at McNally and Associates. If I can provide any additional information, please call or fax me at the numbers above. If you prefer to communicate by e-mail, my address is angela_leclerc@point1promo.net.

Sincerely,

*Angela LeClerc*

Angela LeClerc
Vice President, Marketing

The opening clearly states candidate's full name and the main point of the letter.

LeClerc specifies the duration and nature of their relationship in the body to give weight to the evaluation.

She closes by inviting reader to discuss the candidate further.

The close begins by summarizing the supportive evaluation.

**Pointers for Writing Recommendation Letters**

- Take great care to avoid a lawsuit (either for including too much negative information or for omitting negative information).
- Follow your company's policies in all details; verify only the dates of employment and job titles if that is all the information your company allows to be released.
- Release information only to people who have written authorization from the former employee.
- Consider collaborating with the former employee so that the contents of the letter meet both of your needs.
- If you are unable or unwilling to represent your company in a professional capacity, offer to be a personal reference instead.
- Comment only on your direct experience working with the former employee.
- Limit your remarks to provable facts; avoid hyperbole.
- Ask your human resource department to review the letter before you send it.

MyBCommLab Apply Figure 7.5's key concepts by going to **mybcommlab.com**

**Figure 7.5 Effective Recommendation Letter**
This letter clearly states the nature of the writer's relationship to the candidate and provides specific examples to support the writer's endorsements.

or sponsoring community events. Because good news is always welcome, use the direct approach.

External good-news announcements are often communicated in a **news release**, also known as a *press release*, a specialized document used to share relevant information with the news media. (News releases are also used to announce negative news, such as plant closings.) In most companies, news releases are usually prepared or at least supervised by specially trained writers in the public relations department. The content follows the customary pattern for a positive message: good news followed by details and a positive close. However, traditional news releases have a critical difference: You're not writing directly to the ultimate audience (such as the readers of a newspaper); you're trying to interest an editor or a reporter in a story, and that person will then write the material that is eventually read by the larger audience.

A news release or press release is a message (usually routine, but not always) designed to share information with the news media, although many are now written with customers and other stakeholders in mind as well.

The social media release includes share-ready content that is easy to reuse in blog posts, tweets, and other social media formats.

Until recently, news releases were crafted in a way to provide information to reporters, who would then write their own articles if the subject matter was interesting to their readers. Thanks to the Internet and social media, however, the nature of the news release is changing. Many companies now view it as a general-purpose tool for communicating directly with customers and other audiences, creating *direct-to-consumer news releases*.[3] Many of these are considered *social media releases*, because they include social networking links, "Tweetables" (Twitter-ready statements that can be shared on Twitter at the click of a button), and other sharable content.

## FOSTERING GOODWILL

Goodwill is the positive feeling that encourages people to maintain a business relationship.

All business messages should be written with an eye toward fostering positive relationships with audiences, but some messages are written specifically to build goodwill. You can use these messages to enhance your relationships with customers, colleagues, and other businesspeople by sending friendly, even unexpected, notes with no direct business purpose. Whether you're thanking an employee for a job well done or congratulating a colleague for a personal or professional achievement, the small effort to send a goodwill message can have a positive and lasting effect on the people around you.

Many routine messages can be adapted to foster goodwill, either by sharing helpful information or providing an element of entertainment.

In addition to creating messages for a specific goodwill reason, you can craft almost any routine message in a way to build goodwill. Two ways to do so are by providing information that your readers might find helpful and by maintaining a positive tone throughout your message.

### Sending Congratulations

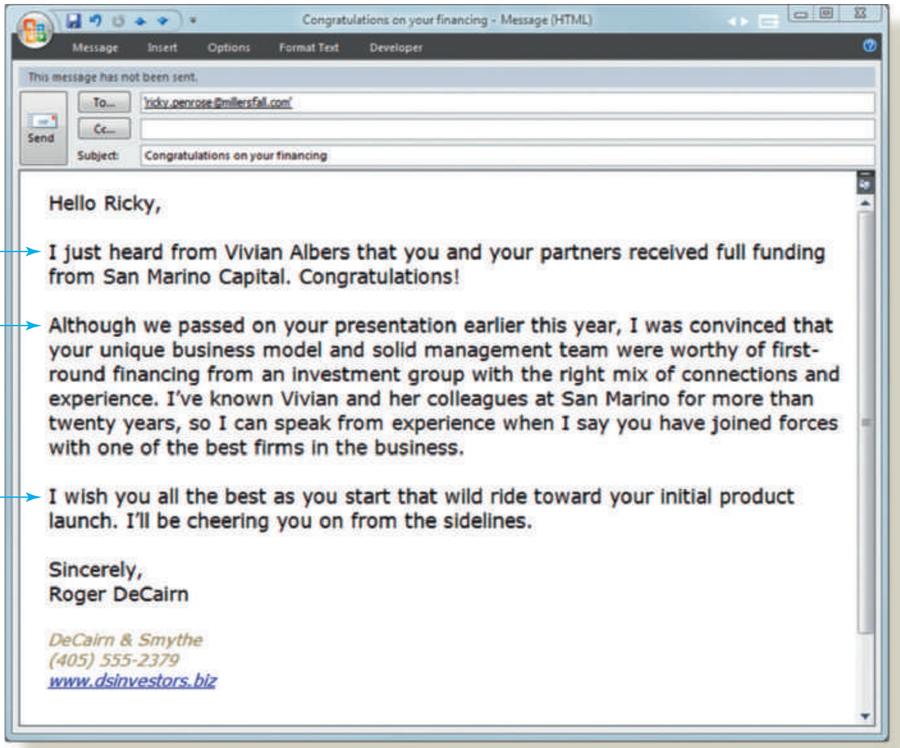
Taking note of significant events in someone's personal life helps foster the business relationship.

One prime opportunity for sending goodwill messages is to congratulate individuals or companies for significant business achievements—perhaps for being promoted or for attaining product sales milestones (see Figure 7.6). Other reasons for sending congratulations

The opening offers a positive and sincere expression of congratulations.

The body reminds the recipient of their previous meeting and offers specific points about the recipient's worthiness in a way that compliments without exaggerating.

The close maintains the upbeat tone and keeps the focus on the recipient.


Congratulations on your financing - Message (HTML)

Message Insert Options Format Text Developer

This message has not been sent.

To... 'ricky.penrose@millersfall.com'

Cc...

Subject: Congratulations on your financing

Hello Ricky,

I just heard from Vivian Albers that you and your partners received full funding from San Marino Capital. Congratulations!

Although we passed on your presentation earlier this year, I was convinced that your unique business model and solid management team were worthy of first-round financing from an investment group with the right mix of connections and experience. I've known Vivian and her colleagues at San Marino for more than twenty years, so I can speak from experience when I say you have joined forces with one of the best firms in the business.

I wish you all the best as you start that wild ride toward your initial product launch. I'll be cheering you on from the sidelines.

Sincerely,
Roger DeCairn

*DeCairn & Smythe*
*(405) 555-2379*
*www.dsinvestors.biz*

**Figure 7.6 Goodwill Messages**
Goodwill messages serve a variety of business functions. In this email message, investor Roger DeCairn congratulates an entrepreneur who had previously sought start-up capital from his firm but later secured funding from another firm. The message may ultimately benefit DeCairn and his company by building goodwill, but it doesn't serve an immediate business purpose.

include highlights in people's personal lives, such as weddings, births, graduations, and success in nonbusiness competitions. You may congratulate business acquaintances on their own achievements or on the accomplishments of a spouse or child. You may also take note of personal events, even if you don't know the reader well. If you're already friendly with the reader, a more personal tone is appropriate.

**REAL-TIME UPDATES**

LEARN MORE BY READING THIS ARTICLE

**Simple rules for writing effective thank-you notes**

These tips are easy to adapt to any business or social occasions in which you need to express appreciation. Go to **http://real-timeupdates.com/bce7.** Under "Students," click on "Learn More."

## Sending Messages of Appreciation

An important leadership quality is the ability to recognize the contributions of employees, colleagues, suppliers, and other associates. Your praise does more than just make the person feel good; it encourages further excellence. A message of appreciation may also become an important part of someone's personnel file, so provide specific information wherever possible, as in this example:

**MOBILE APPS**

Looking for the special touch of a printer letter but have only your phone? Lettr converts your digital message to print and puts it in the mail for you.

> Thank you and everyone on your team for the heroic efforts you took to bring our servers back up after last Friday's flood. We were able to restore business right on schedule first thing Monday morning. You went far beyond the level of contractual service in restoring our data center within 16 hours. I would especially like to highlight the contribution of networking specialist Julienne Marks, who worked for 12 straight hours to reconnect our Internet service. If I can serve as a reference in your future sales activities, please do not hesitate to ask.

An effective message of appreciation documents a person's contributions.

Hearing a sincere thank you can do wonders for morale.[4] Moreover, in today's digital communication media environment, a handwritten thank-you note can be a particularly welcome acknowledgment.[5]

## Offering Condolences

**Condolence letters** are brief personal messages written to comfort someone after the death of a loved one. You may have occasion to offer condolences to employees or other business associates (when the person has lost a family member) or to the family of an employee or business associate (when that person has died).

The primary purpose of condolence messages is to let the audience know that you and the organization you represent care about the person's loss.

These messages can feel intimidating to write, but they don't need to be. Follow these three principles: short, simple, and sincere. You don't need to produce a work of literary art; the fact that you are writing sends a message that is as meaningful as anything you can say.

Timing and media choice are important considerations with condolence letters. The sooner your message is received, the more comforting it will be, so don't delay. And unless circumstances absolutely leave you no choice, do not use digital formats. A brief, handwritten note on quality stationery is the way to go.

Open a condolence message with a simple expression of sympathy, such as "I am deeply sorry to hear of your loss" or "I am sorry for your loss." How you continue from there depends on the circumstances and your relationships with the deceased and the person to whom you are writing. For example, if you are writing to the husband of a colleague who recently died and you have never met him, you might continue with "Having worked with Janice for more than a decade, I know what a kind and caring person she was." Such a statement accomplishes two goals: explaining why you in particular are writing and letting the recipient know that his loved one was appreciated in the workplace.

Conversely, if you are writing to a colleague who recently lost a loved one, you might continue with "After meeting Warren at last year's company picnic and hearing your stories about his involvement with your son's soccer league and the many other ways he contributed to his community, I know what a special person he was." Sharing brief and positive memories like this adds meaning and depth to your expression of sympathy.

You can conclude with a simple statement such as "My thoughts are with you during this difficult time." If appropriate for the situation and your relationship, you might also include an offer of assistance. "Please call if there is anything I do for you."

Keep your condolence message focused on the recipient, not on your own emotions, and don't offer "life advice" or trite sayings.

As you decide what to include in the message, keep two points in mind. First, make it a personal expression of sympathy, but don't make the whole message about you and your sense of loss. You might be grieving as well, but unless you, the deceased, and the reader were all personally close, don't say things like "I was so devastated to hear the news about Mollie."

Second, don't offer "life advice," and don't include trite sayings that you may have heard or read. At this point, soon after the loss, the recipient doesn't want your advice, only your sympathy. Also, don't bring religion into the discussion unless you have a close personal relationship with the recipient and religion is already a part of your relationship. Otherwise, you risk offending with unwelcome or inappropriate sentiments.

Condolence letters are the most personal business messages you may ever have to write, so they require the utmost in care and respect for your reader. By keeping the messages simple, short, and sincere, you will be able to achieve the right tone.

For the latest information on writing routine and positive messages, visit **http://real-timeupdates.com/bce7** and click on Chapter 7.

# Chapter Review and Activities

## Learning Objectives: Check Your Progress

**Objective 1: Outline an effective strategy for writing routine business requests.**

When writing a routine request, open by stating your specific request. Use the body to justify your request and explain its importance. Close routine requests by asking for specific action (including a deadline, if appropriate) and expressing goodwill. A courteous close contains three important elements: (1) a specific request, (2) information about how you can be reached (if it isn't obvious), and (3) an expression of appreciation or goodwill.

**Objective 2: Describe three common types of routine requests.**

The most common types of routine requests are asking for information or action, asking for recommendations, and making claims and requesting adjustments. Requests for information or action should explain what you want to know or what you want readers to do, why you're making the request, and why it may be in your readers' interest to help you (if applicable). Requests for recommendations should open by stating your request. The body should list all the information the recipient would need to write the recommendation (refer to an attached résumé, if applicable). The close should contain an expression of appreciation and a deadline, if applicable. To make a claim (a formal complaint about a product or service) or request an adjustment (a settlement of a claim), open with a straightforward statement of the problem, use the body to give a complete explanation of the situation, and close with a polite request to resolve the situation.

**Objective 3: Outline an effective strategy for writing routine replies and positive messages.**

The direct approach works well for routine replies and positive messages because recipients will generally be interested in what you have to say. Place your main idea (the positive reply or the good news) in the opening. Use the body to explain all the relevant details, and close cordially, perhaps highlighting a benefit to your reader.

**Objective 4: Describe six common types of routine replies and positive messages.**

Most routine and positive messages fall into six categories: answers to requests for information and action, grants of claims and requests for adjustment, recommendations, routine informational messages, good-news announcements, and goodwill messages. Answering requests for information or action is a simple task, often assisted with form responses that can be customized as needed. Granting claims and requests for adjustments is more complicated, and the right response depends on whether the company, the customer, or a third party was at fault. Recommendations also require a careful approach to avoid legal complications; some companies prohibit managers from writing recommendation letters or providing anything beyond basic employment history. Routine informational messages are often simple and straightforward, but some require extra care if the information affects recipients in a significant way. Good-news announcements are often handled by news releases, which used to be sent exclusively to members of the news media but are now usually made available to the public as well. Social media releases enable easy sharing with blog- and Twitter-friendly bites of information. Finally, goodwill messages, meant to foster positive business relationships, include congratulations, thank-you messages, and messages of condolence.

MyBCommLab

Go to **mybcommlab.com** to complete the problems marked with this icon.

## Test Your Knowledge

To review chapter content related to each question, refer to the indicated Learning Objective.

**7-1.** What are three guidelines for asking a series of questions in a routine request? [LO-1]

**7-2.** What three elements should one bear in mind before attempting a routine request? [LO-1]

**7-3.** If a message contains both positive and negative information, what is the best way to present the negative information? [LO-3]

**7-4.** How can you avoid sounding insincere when writing a goodwill message? [LO-4]

**7-5.** What are three principles to follow for writing condolence messages? [LO-4]

## Apply Your Knowledge

To review chapter content related to each question, refer to the indicated Learning Objective.

**7-6.** You've discovered that the laser printer you recently purchased isn't working. Repeated requests to the company to replace it have proved futile. How would you notify the head of the service department of your displeasure? If you had to write a message to the company's top management to draw its attention to the matter and ask for a refund, how would you phrase this message?

**7-7.** The software package your team created last month has just encountered a problem. This was due to mishandling by the client. How would you politely convey the same to your client in a positive manner without earning the client's displeasure?

**7-8.** You've been asked to write a letter of recommendation for an employee who worked for you some years ago. You recall that the employee did an admirable job, but you can't remember any specific information at this point. How should you handle the situation? [LO-4]

## Practice Your Skills

### Exercises for Perfecting Your Writing

To review chapter content related to each set of exercises, refer to the indicated Learning Objective.

**Revising Messages: Direct Approach:** Revise the following short email messages so that they are more direct and concise; develop a subject line for each revised message.

**7-9.** I'm contacting you about your recent order for a High Country backpack. You didn't tell us which backpack you wanted, and you know we make a lot of different ones. We have the canvas models with the plastic frames and vinyl trim, and we have the canvas models with leather trim, and we have the ones that have more pockets than the other ones. Plus they come in lots of different colors. Also they make the ones that are large for a big-boned person and the smaller versions for little women or kids.

**7-10.** Please be informed that due to the festive season from 20th December to 1st January next year, most of our customer service personnel are on their annual vacation. Our apologies for any inconvenience this might cause you. Should you require any assistance during this time, please write to us at helpdesk@stantonworld.com, clearly stating your name, your contact details, and the problem, and we will respond as soon as possible.

**7-11.** Sorry it took us so long to get back to you. We were flooded with résumés. Anyway, your résumé made the final 10, and after meeting three hours yesterday, we've decided we'd like to meet with you. What is your schedule like for next week? Can you come in for an interview on June 15 at 3:00 p.m.? Please get back to us by the end of this work week and let us know if you will be able to attend. As you can imagine, this is our busy season.

**Revising Messages: Direct Approach:** Rewrite the following sentences so that they are direct and concise.

**7-12.** We wanted to invite you to our special 40 percent off by-invitation-only sale. The sale is taking place on November 9.

**7-13.** The decision to do away with the services of Mr. Clarke by the board of directors was taken unanimously by a show of hands.

**7-14.** The director planned to go to the meeting that will be held on Monday at a little before 11:00 a.m.

**7-15.** Enraptured by the performance of the lead opera singer in the musical, Sir Kenneth Drake offered her a proposal of marriage. Being a man of wealth and high stature, he wooed her with a priceless diamond ring.

**Teamwork:** With another student, conduct an audience analysis of the following message topic: A notice to all employees announcing that to avoid layoffs, the company will institute a 10 percent salary reduction for the next six months.

**7-16.** If the company is small and all employees work in the same location, which medium would you recommend for communicating this message?

**7-17.** If the company is large and employees work in a variety of locations around the world, which medium would you recommend for communicating this message?

**7-18.** How is the audience likely to respond to this message?

**7-19.** Based on this audience analysis, would you use the direct or the indirect approach for this message? Explain your reasoning.

**Revising Messages: Closing Paragraphs:** Rewrite each of the following closing paragraphs to be concise, courteous, and specific.

**7-20.** I need your response sometime soon so I can order the parts in time for your service appointment. Otherwise your air-conditioning system may not be in tip-top condition for the start of the summer season.

**7-21.** Thank you in advance for sending me as much information as you can about your products. I look forward to receiving your package in the very near future.

**7-22.** Now that you have the details of what has transpired recently with regard to my being unfairly billed for a service that I hardly used, it would be appreciated if you refunded the said amount without further delay. Failure on your part to do so within the next two weeks would warrant the initiation of legal proceedings from my end.

### Activities

Each activity is labeled according to the primary skill or skills you will need to use. To review relevant chapter content, you can refer to the indicated Learning Objective. In some instances, supporting information will be found in another chapter, as indicated.

**7-23. Message Strategies: Making Routine Requests; Completing: Evaluating Content, Organization, and Tone [LO-2], Chapter 5** Analyze the strengths and weaknesses of this message and then revise it so that it follows this chapter's guidelines for routine requests for information:

> Our company is currently facing a crisis situation with some negative reports appearing in the local press. Our current PR agency seems ill-equipped to handle this crisis and we are currently looking for a suitable alternative with expertise in crisis management. We'd appreciate it if you sent us your corporate profile and a summary of work done in the area of crisis communications. Given the negative publicity we've received, please also let us know your strengths in media management and how you would attempt to resolve the issue.

**7-24. Message Strategies: Making Routine Requests; Completing: Evaluating Content, Organization, and Tone [LO-2], Chapter 5** Analyze the strengths and weaknesses of this message and then revise it so that it follows this chapter's guidelines for routine requests for information:

> I'm contacting you about your recent email request for technical support on your cable Internet service. Part of the problem we have in tech support is trying to figure out exactly what each customer's specific problem is so that we can troubleshoot quickly and get you back in business as quickly as possible. You may have noticed that in the online support request form, there are a number of fields to enter your type of computer, operating system, memory, and so on. While you did tell us you were experiencing slow download speeds during certain times of the day, you didn't tell us which times specifically, nor did you complete all the fields telling us about your computer. Please return to our support website and resubmit your request, being sure to provide all the necessary information; then we'll be able to help you.

**7-25. Message Strategies: Writing Routine Replies; Completing: Evaluating Content, Organization, and Tone [LO-4], Chapter 5** Analyze the strengths and weaknesses of this message and then revise it so that it follows this chapter's guidelines for writing routine replies in a positive manner:

> We are pleased to inform you that you have been selected for the one year Master's Degree in Paediatric Surgery program at Brown University, beginning this fall. Your application, though rather late, has been accepted. Your academic credentials have impressed us, as did your work in the area of congenital heart disease. While the skills you've demonstrated are commendable, the techniques you've adopted are rather primitive and obsolete in today's neo-natal surgical practice. I am sure that this course will provide you with the latest procedural insights and also enable you to research and develop new techniques that could shape the future of paediatric heart surgery.
>
> We are sorry to inform you, however, that your request for a scholarship to the program has been rejected and you have to pay the entire course fee of $22,000.00. This does not include charges towards boarding and lodging, which we assume you have already arranged for. Kindly confirm your attendance for this program by depositing an amount of $ 10,000.00 within seven days as payment for the first semester, following which you will receive confirmation of your registration.

**7-26. Message Strategies: Writing Routine Replies; Completing: Evaluating Content, Organization, and Tone [LO-4], Chapter 5** Analyze the strengths and weaknesses of this message and then revise it so that it follows this chapter's guidelines for responding to requests for adjustments:

> We read your letter, requesting your deposit refund. We couldn't figure out why you hadn't received it, so we talked to our maintenance engineer, as you suggested. He said you had left one of the doors off the hinges in your apartment in order to get a large sofa through the door. He also confirmed that you had paid him $5.00 to replace the door since you had to turn in the U-Haul trailer and were in a big hurry.
>
> This entire situation really was caused by a lack of communication between our housekeeping inspector and the maintenance engineer. All we knew was that the door was off the hinges when it was inspected by Sally Tarnley. You know that our policy states that if anything is wrong with the apartment, we keep the deposit. We had no way of knowing that George just hadn't gotten around to replacing the door.
>
> But we have good news. We approved the deposit refund, which will be mailed to you from our home office in Teaneck, New Jersey. I'm not sure how long that will take, however. If you don't receive the check by the end of next month, give me a call.
>
> Next time, it's really a good idea to stay with your apartment until it's inspected, as stipulated in your lease agreement. That way, you'll be sure to receive your refund when you expect it. Hope you have a good summer.

**7-27. Message Strategies: Writing Positive Messages; Media Skills: Microblogging [LO-4], Chapter 6** Locate an online announcement for a new product you find interesting or useful. Read enough about the product to be able to describe it to someone else in your own words and then write four Twitter tweets: one to introduce the product to your followers and three follow-on tweets that describe three particularly compelling features or benefits of the product.

**7-28. Message Strategies: Writing Condolence Messages [LO-4]** You've been working two years as administrative assistant to Ron Glover, vice president of global workforce diversity at IBM's Learning Center in Armonk, New York. After listening to many of his speeches on maintaining multicultural sensitivity in the workplace, you know you're facing a sensitive situation right now.

The husband of your coworker Chana Panichpapiboon was killed in a bus accident yesterday, along with 19 others. The bus skidded on icy pavement into a deep ravine, tipping over and crushing the occupants before rescue workers could get to them.

You met her husband, Surin, last year at a company banquet. You can still picture his warm smile and the easy way he joked with you and others, even though you were complete strangers to him. He was only 32 years old, and he left Chana with two children, a 12-year-old boy, Arsa, and a 10-year-old girl, Veera.

Use the following questions to help you think through your choices before you begin writing:

**a.** Which of the following sentences would make the best opening?
  1. I am sorry for your loss.
  2. What a terrible tragedy you have suffered.
  3. I was crushed by the horrible news about your husband.
  4. You and your children must be so upset, and who could blame you?

**b.** In the body of the letter, you want to express something meaningful, but you are not familiar with Chana's religious beliefs, and you're not sure what's safe. Choose the best idea from the following:
  1. You could include a poetic quotation that doesn't mention any particular religion.
  2. You could express your deep sorrow for Chana's children.
  3. You could mention something positive about Surin you learned during your brief meeting.
  4. You could ask her close friends at work about her religious preferences and then do some research to come up with something appropriate to say.

**c.** For your closing paragraph, which of these ideas is best?
  1. Take a moment to express your thoughts about death and the hereafter.
  2. Say that you are thinking of her during this difficult period and invite her to call if you or the company can assist her in any way.
  3. Explain that you don't understand her religious beliefs and aren't sure what's appropriate to say at this time.
  4. Any of the above.

**d.** In the following list, identify all the phrases you should avoid as you write:
  1. Life is for the living
  2. I am sorry for your loss
  3. Karma
  4. Unbearable pain

Now write the condolence letter in your own words, using the advice from the chapter.

## Expand Your Skills

### Critique the Professionals

Locate an online example of a news release in which a company announces good news, such as a new product, a notable executive hire, an expansion, strong financial results, or an industry award. Analyze the release using the guidance provided in the chapter. In what ways did the writer excel? What aspects of the release could be improved? Does the release provide social media-friendly content and features? Using whatever medium your instructor requests, write a brief analysis of the piece (no more than one page), citing specific elements from the piece and support from the chapter.

### Sharpen Your Career Skills Online

Bovée and Thill's Business Communication Web Search, at **http://websearch.businesscommunicationnetwork.com**, is a unique research tool designed specifically for business communication research. Use the Web Search function to find a website, video, PDF document, podcast, or presentation that offers advice on writing goodwill messages such as thank-you notes or congratulatory letters. Write a brief email message to your instructor or a post for your class blog, describing the item that you found and summarizing the career skills information you learned from it.

# Cases

Website links for selected companies mentioned in cases can be found in the Student Assignments section at **http://real-timeupdates.com/bce7**.

### BLOGGING SKILLS

**7-29. Message Strategies: Requesting Information [LO-2], Chapter 6** You are writing a book about the advantages and potential pitfalls of using online collaboration systems for virtual team projects. You would like to include several dozen real-life examples from people in a variety of industries. Fortunately, you publish a highly respected blog on the subject, with several thousand regular readers.

**Your task:** Write a post for your blog that asks readers to submit brief descriptions of their experiences using collaboration tools for team projects. Ask them to email stories of how well a specific system or approach worked for them. Explain that they will receive an autographed copy of the book as thanks, but they will need to sign a release form if their stories are used. In addition, emphasize that you would like to use real names—of people, companies, and software—but you can keep the anecdotes anonymous if readers require. To stay on schedule, you need to have these stories by May 20.

## EMAIL SKILLS

**7-30. Message Strategies: Requesting a Recommendation [LO-2]** One of your colleagues, Katina Vander, was recently promoted to department manager and now serves on the company's strategic planning committee. At its monthly meeting next week, the committee will choose an employee to lead an important market research project that will help define the company's product portfolio for the next five years.

You worked side by side with Vander for five years, so she knows your abilities well and has complimented your business insights on many occasions. You know that because she has only recently been promoted to manager, she needs to build credibility among her peers and will therefore be cautious about making such an important recommendation. On the other hand, making a stellar recommendation for such an important project would show that she has a good eye for talent—an essential leadership trait.

**Your task:** Write an email message to Vander, telling her that you are definitely interested in leading the project and asking her to put in a good word for you with the committee. Mention four attributes that you believe would serve you well in the role: a dozen years of experience in the industry, an engineering degree that helps you understand the technologies involved in product design, a consistent record of excellent or exceptional ratings in annual employee evaluations, and the three years you spent working in the company's customer support group, which gave you a firsthand look at customer satisfaction and quality issues. Make up any additional details you need to write the message.

## IM SKILLS

**7-31. Message Strategies: Requesting Information [LO-2]** Many companies now provide presales and postsales customer support through some form of instant messaging or online chat function. As a consumer looking for information, you'll get better service if you can frame your requests clearly and succinctly.

**Your task:** Imagine that you need to replace your old laptop computer, but you're not sure whether to go with another laptop or switch to a tablet or perhaps one of the new tablet/laptop hybrids. Think through the various ways you will use this new device, from researching and note-taking during class to watching movies and interacting with friends on social media. Now imagine you're in a chat session with a sales representative from a computer company, and this person has asked how he or she can help you. Draft a message (no more than 100 words) that summarizes your computing and media requirements and asks the representative to recommend the right type of device for you.

## TEXT MESSAGING SKILLS

**7-32. Message Strategies: Making Routine Requests [LO-2]** The vast Consumer Electronics Show (CES) is the premier promotional event in the electronics industry. More than 150,000 industry insiders from all over the world come to see the exciting new products on display from 3,000 companies—everything from video game gadgets to Internet-enabled refrigerators with built-in computer screens.[6] You've just stumbled on a video game controller that has a built-in webcam to allow networked gamers to see and hear each other while they play. Your company also makes game controllers, and you're worried that your customers will flock to this new controller-cam. You need to know how much "buzz" is circulating around the show: Have people seen it? What are they saying about it? Are they excited about it?

**Your task:** Compose a text message to your colleagues at the show, alerting them to the new controller-cam and asking them to listen for any buzz that it might be generating among the attendees at the Las Vegas Convention Center and the several surrounding hotels where the show takes place. Your text messaging service limits messages to 160 characters, including spaces and punctuation, so keep your message within that limit.

## EMAIL SKILLS

**7-33. Message Strategies: Granting Claims [LO-4]** Your company sells flower arrangements and gift baskets. Holidays are always a rush, and the overworked staff makes an occasional mistake. Last week, somebody made a big one. As a furious email message from a customer named Anders Ellison explains, he ordered a Valentine's Day bouquet for his wife, but the company sent a bereavement arrangement instead.

**Your task:** Respond to Ellison's email message, apologizing for the error, promising to refund all costs that Ellison incurred, informing him that the correct arrangement will arrive tomorrow (and he won't be charged anything for it), and offering Ellison his choice of any floral arrangement or gift basket for free on his wife's birthday.

## EMAIL SKILLS

**7-34. Message Strategies: Granting Claims [LO-4]** Like many of the staff at Razer, you are an avid game player. You can therefore sympathize with a customer who got so excited during a hotly contested game that he slammed his Razer Anansi keyboard against his chair in celebration. Razer products are built for serious action, but no keyboard can withstand a blow like that. However, in the interest of building goodwill among the online gaming community, your manager has approved a free replacement. This sort of damage is rare enough that the company isn't worried about unleashing a flood of similar requests.

**Your task:** Respond to Louis Hapsberg's email request for a replacement, in which he admitted to inflicting some abuse on this keyboard. Explain, tongue in cheek, that the company is "rewarding" him with a free keyboard in honor of his massive gaming win, but gently remind him that even the most robust electronic equipment needs to be used with care.

## PODCASTING SKILLS

**7-35. Message Strategies: Writing Routine Messages [LO-4], Chapter 6** As a training specialist in the human resources department at Winnebago Industries, you're always on the lookout for new ways to help employees learn vital job skills. While watching a production worker page through a training manual, learning how to assemble a new recreational vehicle, you get what seems to be a great idea: Record the assembly instructions as audio files that workers can listen to while performing the necessary steps. With audio instructions, they wouldn't need to keep shifting their eyes between the product and the manual—and constantly losing their place. They could focus on the product and listen for each instruction. Plus, the new system wouldn't cost much at all; any computer can record the audio files, and you'd simply make them available on an intranet site for download onto iPods or other digital music players.

**Your task:** You immediately run your new idea past your boss, who has heard about podcasting but isn't sure it is appropriate for business training. He asks you to prove the viability of the idea by recording a demonstration. Choose a process that you engage in yourself—anything from replacing the strings on a guitar to sewing a quilt to changing the oil in a car—and write a brief (one page or less) description of the process that could be recorded as an audio file. Think carefully about the limitations of the audio format as a replacement for printed text (for instance, do you need to tell people to pause the audio while they perform each task?). If your instructor directs, record your podcast and submit the audio file.

## BLOGGING SKILLS

**7-36. Message Strategies: Writing Routine Informational Messages [LO-4]** You are normally an easygoing manager who gives employees a lot of leeway in using their own personal communication styles. However, the weekly staff meeting this morning pushed you over the edge. People were interrupting one another, asking questions that had already been answered, sending text messages during presentations, and exhibiting just about every other poor listening habit imaginable.

**Your task:** Review the advice in Chapter 2 on good listening skills, then write a post for the internal company blog. Emphasize the importance of effective listening and list at least five steps your employees can take to become better listeners.

## MICROBLOGGING SKILLS

**7-37. Message Strategies: Routine Announcements [LO-4]** As a way to give back to the communities in which it does business, your company supports the efforts of the United Way, a global organization that works to improve lives through education, income stability, and healthy living choices.[7] Each year, your company runs a fundraising campaign in which employees are encouraged to donate money to their local United Way agencies, and it also grants employees up to three paid days off to volunteer their time for the United Way. This year, you are in charge of the company's campaign.

**Your task:** Compose a four-message sequence to be posted on the company's internal microblogging system (a private version of Twitter, essentially). The messages are limited to 200 characters, including spaces and punctuation. The first message will announce the company's annual United Way volunteering and fundraising campaign (make up any details you need), and the other three messages will explain the United Way's efforts in the areas of education, income stability, and healthy living. Visit the United Way website to learn more about these three areas.

## BLOGGING SKILLS

**7-38. Message Strategies: Routine Announcements [LO-4]** Scoop.it is one of the most popular platforms for content curation (see page 181). One of the ways a company can use Scoop.it is to find and present content of interest to its customers.

**Your task:** Choose any company that interests you and imagine that you are in charge of its public communication efforts. Write a post for the company's internal blog, announcing that the company is now on Scoop.it. Briefly describe Scoop.it and explain how it will help the company connect with its customers. Visit the Scoop.it website to learn more about it. Feel free to make up any information you need to complete your post.

## LETTER WRITING SKILLS/TEAM SKILLS

**7-39. Message Strategies: Writing Positive Messages; Collaboration: Team Projects [LO-4], Chapter 2** As a project manager at Orbitz, one of the largest online travel services in the world, you've seen plenty of college interns in action. However, few have impressed you as much as Maxine "Max" Chenault. For one thing, she learned how to navigate the company's content management system virtually overnight and always used it properly, whereas other interns sometimes left things in a hopeless mess. She asked lots of intelligent questions about the business. You've been teaching her blogging and website design principles, and she's picked them up rapidly. Moreover, she has always been on time, professional, and eager to assist, and she doesn't complain about doing mundane tasks.

On the down side, Chenault is a popular student. Early on, you often found her busy on the phone planning her many social activities when you needed her help. However, after you had a brief talk with her, this problem vanished.

You'll be sorry to see Chenault leave when she returns to school in the fall, but you're pleased to respond when she asks you for a letter of recommendation. She's not sure where she'll apply for work after graduation or what career path she'll choose, so she asks you to keep the letter fairly general.

**Your task:** Working with a team assigned by your instructor, discuss what should and should not be in the letter. Prepare an outline based on your discussion and then draft the letter.

## SOCIAL NETWORKING SKILLS

**7-40. Message Strategies: Writing Routine Informative Messages; Composition Modes: Summarizing [LO-4]** As energy costs trend ever upward and more people become attuned to the environmental and geopolitical complexities of petroleum-based energy, interest in solar, wind, and other alternative energy sources continues to grow. In locations with high insolation, a measure of cumulative sunlight, solar panels can be cost-effective solutions over the long term. However, the up-front costs are still daunting for most homeowners. To help lower the entry barrier, the firm SolarCity, based in Foster City, California, now lets homeowners lease solar panels for monthly payments that are less than their current electricity bills.[8]

**Your task:** Visit the Solar City website, click on Residential, and then click SolarLease to read about the leasing program. Next, study SolarCity's presence on Facebook to get a feel for how the company presents itself in a social networking environment. Now assume that you have been assigned the task of writing a brief summary of the SolarLease program that will appear on the

Notes tab of SolarCity's Facebook page. In your own language and in 200 words or less, write an introduction to the SolarLease program and email it to your instructor.

### BLOGGING SKILLS

**7-41. Message Strategies: Good News Messages [LO-4]** Amateur and professional golfers in search of lower scores want to find clubs that are optimized for their individual swings. This process of club fitting has gone decidedly high tech in recent years, with fitters using Doppler radar, motion-capture video, and other tools to evaluate golfers' swings and ball flight characteristics. Hot Stix Golf is a leader in this industry, having fitted more than 200 professionals and thousands of amateurs.[9]

**Your task:** Imagine that you are the communications director at the Indian Wells Golf Resort in Indian Wells, California. Your operation has just signed a deal with Hot Stix to open a fitting center on site. Write a three-paragraph message that could be posted on the resort blog. The first paragraph should announce the news that the Hot Stix center will open in six months, the second should summarize the benefits of club fitting, and the third should offer a brief overview of the services that will be available at the Indian Wells Hot Stix Center. Information on club fitting can be found on the Hot Stix website; make up any additional information you need to complete the post.

### BLOGGING SKILLS/PORTFOLIO BUILDER

**7-42. Message Strategies: Good-News Messages [LO-4]** Most people have heard of the Emmy, Grammy, Oscar, and Tony awards for television, music, movies, and theater performances, but fewer know what the Webby award is all about. Sponsored by the International Academy of Digital Arts and Sciences, the Webbys shine a spotlight on the best in website design, interactive media, and online film and video.[10]

**Your task:** Visit the Webby Awards website, click on Winners, and choose one of the companies listed as a winner in the Websites or Interactive Advertising categories. Now imagine you are the chief online strategist for this company, and you've just been informed your company won a Webby. Winning this award is a nice validation of the work your team has put in during the last year, and you want to share their success with the entire company. Write a brief post for the internal company blog, describing what the Webby awards are, explaining why they are a significant measure of accomplishment in the online industry, and congratulating the employees in your department who contributed to the successful web effort.

### LETTER WRITING SKILLS

**7-43. Message Strategies: Goodwill Messages [LO-4]** Shari Willison worked as a geologist in your civil engineer firm for 20 years before succumbing to leukemia. With only a few dozen employees, the company has always been a tight-knit group, and you feel like you've lost a good friend in addition to a valued employee.

**Your task:** Write a letter of condolence to Willison's husband, Arthur, and the couple's teenaged children, Jordan and Amy. You have known all three socially through a variety of company holiday parties and events over the years. Make up any details you need.

## Improve Your Grammar, Mechanics, and Usage

You can download the text of this assignment from http://real-timeupdates.com/bce7; click on Student Assignments and then click on Chapter 7.

### Level 1: Self-Assessment—Periods, Question Marks, and Exclamation Points

Review Sections 2.1, 2.2, and 2.3 in the Handbook of Grammar, Mechanics, and Usage, and then complete the following 15 items.

For the following items, add periods, question marks, and exclamation points wherever they are appropriate.

**7-44.** Dr Eleanor H Hutton has requested information on Task-Masters, Inc.

**7-45.** That qualifies us as a rapidly growing new company, don't you think

**7-46.** Our president, Daniel Gruber, is a CPA On your behalf, I asked him why he started the company

**7-47.** In the past three years, we have experienced phenomenal growth of 800 percent

**7-48.** Contact me at 1358 N Parsons Avenue, Tulsa, OK 74204

**7-49.** Jack asked, "Why does he want to know Maybe he plans to become a competitor"

**7-50.** The debt load fluctuates with the movement of the US prime rate

**7-51.** I can't believe we could have missed such a promising opportunity

**7-52.** Is consumer loyalty extinct Yes and No

**7-53.** Johnson and Kane, Inc, has gone out of business What a surprise

**7-54.** Will you please send us a check today so that we can settle your account

**7-55.** Mr James R Capp will be our new CEO, beginning January 20, 2014

**7-56.** The rag doll originally sold for $1098, but we have lowered the price to a mere $599

**7-57.** Will you be able to make the presentation at the conference, or should we find someone else

**7-58.** So I ask you, "When will we admit defeat" Never

### Level 2: Workplace Applications

The following items may contain errors in grammar, capitalization, punctuation, abbreviation, number style, word division, and vocabulary. Rewrite each sentence, correcting all errors. If a sentence has no errors, write "Correct" for that number.

**7-59.** Attached to both the Train Station and the Marriott ho-tel, one doesnt even need to step outside the convention center to go from train to meeting room.

**7-60.** According to Federal statistics, 61 percent of the nations employers have less than 5 workers.

**7-61.** "The problem", said Business Owner Mike Millorn, "Was getting vendor's of raw materials to take my endeavor serious."

**7-62.** After pouring over trade journals, quizzing industry experts, and talks with other snack makers, the Harpers' decided to go in the pita chip business.

**7-63.** Some argue that a Mac with half as much RAM and a slower processor is as fast or faster than a PC.

**7-64.** The couple has done relatively little advertising, instead they give away samples in person at trade shows, cooking demonstrations, and in grocery stores.

**7-65.** CME Information Services started by videotaping doctor's conventions, and selling the recorded presentations to nonattending physicians that wanted to keep track of the latest developments.

**7-66.** For many companies, the two biggest challenges to using intranets are: getting people to use it and content freshness.

**7-67.** Company meetings including 'lunch and learn' sessions are held online often.

**7-68.** Most Children's Orchard franchisees, are men and women between the ages of 30–50; first time business owners with a wide range of computer skills.

**7-69.** Joining the company in 1993, she had watched it expand and grow from a single small office to a entire floor of a skyscraper.

**7-70.** One issue that effected practically everyone was that they needed to train interns.

**7-71.** The website includes information on subjects as mundane as the filling out of a federal express form, and as complex as researching a policy issue.

**7-72.** "Some management theories are good, but how many people actually implement them the right way?", says Jack Hartnett President of D. L. Rogers Corp.

**7-73.** Taking orders through car windows, customers are served by roller-skating carhops at Sonic restaurants.

### Level 3: Document Critique

The following email message (an initial inquiry to a firm that designs and builds corporate websites) may contain errors in grammar, punctuation, capitalization, abbreviation, number style, vocabulary, and spelling. You will also find errors related to topics in this chapter. For example, consider the organization and relevance of material as you improve this routine request for information. As your instructor indicates, photocopy this page and correct all errors using standard proofreading marks (see Appendix C), or download the document and make the corrections in your word-processing software.

TO: info@spacewebdesign.biz
FROM: gloria_m@midwestliquidators.com
SUBJECT: New website!

To Whom it may concern.

We need a new website. One that offers all the whizzy new social media apabilities plus ful e/commerce ordering & retailing function.

I am seeing your name in the fine print of a few nice looking sights. So I wanted to get more info on you people and find out about costs, schedules, info needs from us, etc., etc., etc. What it will take to get this new thing up and running, inother words. We also need to know what you plan to do about our "visual" appearance on the website—as in—how will you design a site that screams "good values found here" without looking cheap and shoddy like some discount/retail webbsites are . . .

My name is Gloria MacPherson, and I am in charge of Marketing and sales department here at Midwest Liquidators. I've been with the Company since 2003; before that I was with Costco; before that I was with Sears.

Part of my analysis of outsiders like you will depend on how fast you respond to this query, just to let you know.

Sincerely.
Gloria

## MyBCommLab

Go to **mybcommlab.com** for the following Assisted-graded writing questions:

**7-74.** Why is it good practice to explain, when applicable, how replying to a request could benefit the reader? [LO-1]

**7-75.** You have a complaint against one of your suppliers, but you have no documentation to back it up. Should you request an adjustment anyway? Why or why not? [LO-2]

## Endnotes

**1.** Warren E. Buffett, Preface to *A Plain English Handbook*, U.S. Securities and Exchange Commission website, accessed 4 July 2010, www.sec.gov.
**2.** "How to Write Reference Letters," National Association of Colleges and Employers website, accessed 5 July 2010, www.naceweb.org; "Five (or More) Ways You Can Be Sued for Writing (or Not Writing) Reference Letters," Fair Employment Practices Guidelines, July 2006, 1, 3.
**3.** David Meerman Scott, *The New Rules of Marketing and PR* (Hoboken, N.J.: Wiley, 2007), 62.
**4.** Pat Cataldo, "Op-Ed: Saying 'Thank You' Can Open More Doors Than You Think," Penn State University Smeal College of Business website, accessed 19 February 2008, www.smeal.psu.edu.
**5.** Jackie Huba, "Five Must-Haves for Thank-You Notes," Church of the Customer Blog, 16 November 2007, www.churchofthecustomer .com.
**6.** CES website, accessed 11 June 2012, www.cesweb.org; Darren Murph, "CES 2012 Sets All-Time Records for Attendance, Exhibitors and Claimed Floor Space," Engadget, 13 January 2012, www.engadget .com.
**7.** United Way website, accessed 30 January 2013, www.unitedway.org.
**8.** SolarCity website, accessed 11 June 2012, www.solarcity.com.
**9.** Hot Stix Golf website, accessed 11 June 2012, www.hotstixgolf.com.
**10.** The Webby Awards website, accessed 30 January 2013, www .webbyawards.com.

# 8 Writing Negative Messages

## LEARNING OBJECTIVES

After studying this chapter, you will be able to

1. Apply the three-step writing process to negative messages
2. Explain how to use the direct approach effectively when conveying negative news
3. Explain how to use the indirect approach effectively when conveying negative news, and explain how to avoid ethical problems when using this approach
4. Describe successful strategies for sending negative messages on routine business matters
5. Describe successful strategies for sending negative employment-related messages
6. List the important points to consider when conveying negative organizational news
7. Describe an effective strategy for responding to negative information in a social media environment



## Communication Matters . . .

"You know what [consumers] hate most? A cover-up. They understand that we all goof-up now and then, but they expect us to fess-up immediately and do right by those who may have been misled or injured as a result of the error."[1]

—W. T. "Bill" McKibben, senior counsel, The Great Lakes Group

From network hacker attacks to product safety failures, business leaders must sometimes face the need to communicate unwelcome information to consumers and other interested parties. As communication ethics advisor Bill McKibben emphasizes, playing it straight with those who have been affected is essential to repairing business relationships. Sharing unwelcome news is never pleasant, but learning how to do it with sensitivity and honesty will make the task easier for you as a writer and the experience less traumatic for the recipients of your messages.


Linda Parton/Alamy

According to communication ethics specialist Bill McKibben, consumers demand ethical responses from companies that make mistakes, and that commitment to ethics must be reflected in external communication efforts. General Motors (GM), for example, was criticized for not disclosing long-running safety issues with ignition switches until an outsider investigator uncovered the problem.

# Using the Three-Step Writing Process for Negative Messages

**1 LEARNING OBJECTIVE**
Apply the three-step writing process to negative messages.

Five goals of negative messages:
- Give the bad news
- Encourage its acceptance
- Maintain the reader's goodwill
- Maintain the organization's good image
- Manage the volume of future correspondence on the matter

Careful planning is necessary to avoid alienating your readers.

Choose the medium with care when preparing negative messages.

The appropriate message organization helps readers accept your negative news.

Delivering negative information is never enjoyable, but with some helpful guidelines, you can craft messages that minimize negative reactions. When you need to deliver bad news, you have five goals: (1) to convey the bad news, (2) to gain acceptance for it, (3) to maintain as much goodwill as possible with your audience, (4) to maintain a good image for your organization, and (5) if appropriate, to reduce or eliminate the need for future correspondence on the matter. Accomplishing all five goals requires careful attention to planning, writing, and completing your message.

## STEP 1: PLANNING NEGATIVE MESSAGES

When you need to convey negative news, you can't avoid the fact that your audience does not want to hear what you have to say. To minimize the damage to business relationships and to encourage the acceptance of your message, plan carefully. With a clear purpose and your audience's needs in mind, gather the information your audience will need in order to understand and accept your message.

Selecting the right combination of medium and channel is critical. For instance, experts advise that bad news for employees be delivered in person whenever possible, both to show respect for the employees and to give them an opportunity to ask questions. However, and an increasing number of managers appear to be using email and other digital media to convey negative messages to employees.[2]

Finally, the organization of a negative message requires particular care. One of the most critical planning decisions is choosing whether to use the direct or indirect approach (see Figure 8.1). A negative message using the **direct approach** opens with the bad news, proceeds to the reasons for the situation or decision, offers any additional information that may

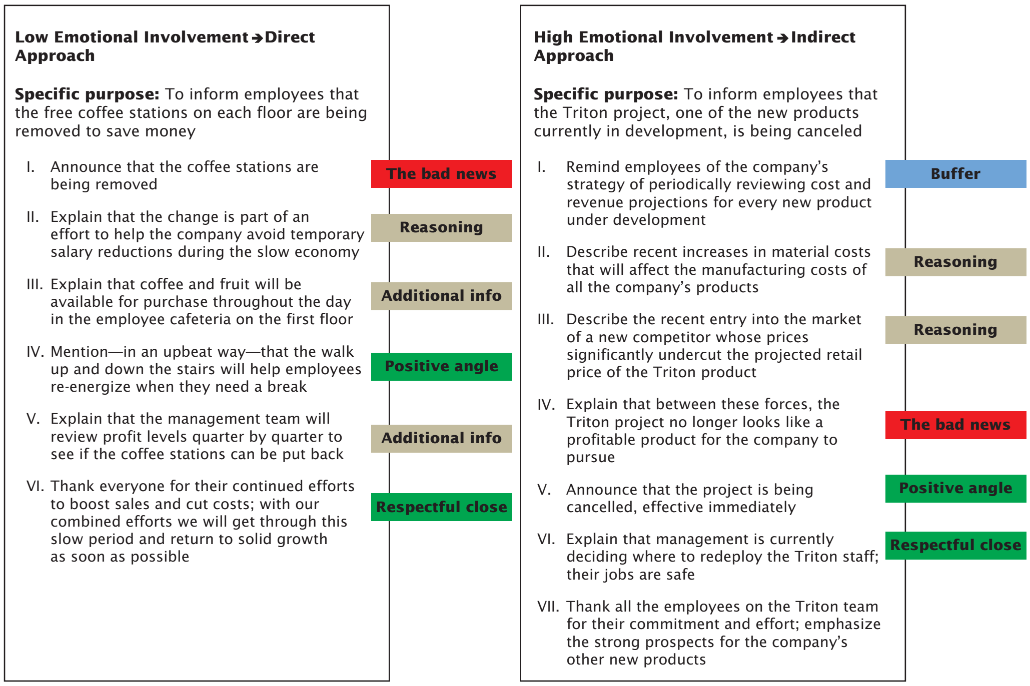



**Figure 8.1 Comparing the Direct and Indirect Approaches for Negative Messages**
The direct and indirect approaches differ in two important ways: the position of the bad news within the sequence of message points and the use of a *buffer* in the indirect approach. ("Using the Indirect Approach for Negative Messages" on page 231 explains the use of a buffer.) Both these messages deal with changes made in response to negative financial developments, but the second example represents a much higher emotional impact for readers, so the indirect approach is called for in that case. Figure 8.2 explains how to choose the right approach for each situation.

help the audience, and ends with a positive statement aimed at maintaining a good relationship with the audience. In contrast, the **indirect approach** opens with a *buffer* (see page 231), then builds up the reasons behind the bad news before presenting the bad news itself.

To help decide which approach to take in a particular situation, ask yourself the following questions:

Use the direct approach when your negative answer or information will have minimal personal impact; consider the indirect approach for more serious matters.

- **Do you need to get the reader's attention immediately?** If the situation is an emergency, or if someone has ignored repeated messages, the direct approach can help you get attention quickly.
- **Does the recipient prefer a direct style of communication?** Some recipients prefer the direct approach no matter what, so if you know this, go with direct.
- **How important is this news to the reader?** For minor or routine scenarios, the direct approach is nearly always best. However, if the reader has an emotional investment in the situation or the consequences to the reader are considerable, the indirect approach is often better, particularly if the bad news is unexpected.
- **Will the bad news come as a shock?** The direct approach is fine for many business situations in which people understand the possibility of receiving bad news. However, if the bad news might come as a shock to readers, use the indirect approach to help them prepare for it.

Figure 8.2 offers a convenient decision tree to help you decide which approach to use.

## STEP 2: WRITING NEGATIVE MESSAGES

By writing clearly and sensitively, you can take some of the sting out of bad news and help your reader accept the decision and move on. If your credibility hasn't already been

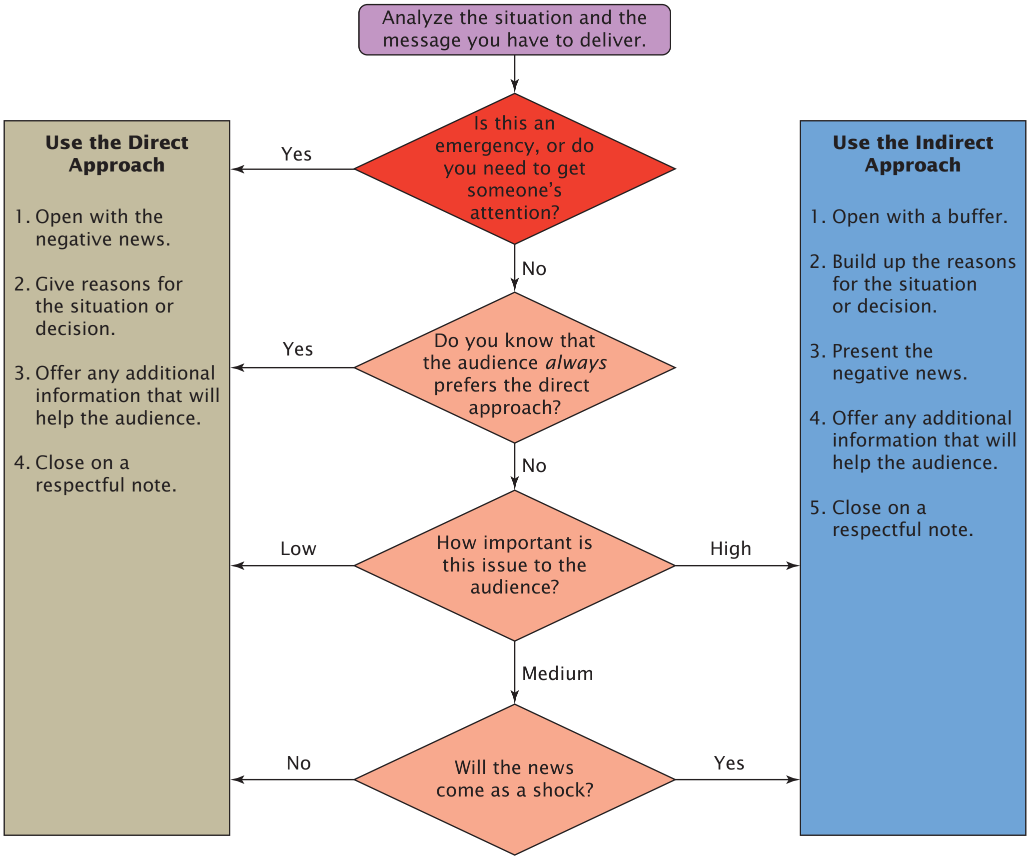



**Figure 8.2 Choosing the Direct or Indirect Approach**
Following this decision tree will help you decide whether the direct or indirect approach is better in a given situation. Of course, use your best judgment as well. Your relationship with the audience could affect your choice of approaches, for example.

TABLE 8.1 **Choosing Positive Words**

| Examples of Negative Phrasings | Positive Alternatives |
|---|---|
| Your request *doesn't make any sense.* | Please clarify your request. |
| The *damage won't be fixed* for a week. | The item will be repaired next week. |
| Although it wasn't *our fault*, there will be an *unavoidable delay* in your order. | We will process your order as soon as we receive an aluminum shipment from our supplier, which we expect within 10 days. |
| You are clearly *dissatisfied*. | I recognize that the product did not live up to your expectations. |
| I was *shocked* to learn that you're *unhappy*. | Thank you for sharing your concerns about your shopping experience. |
| The enclosed statement is *wrong*. | Please verify the enclosed statement and provide a correct copy. |

established with an audience, clarify your qualifications so recipients won't question your authority or ability.

Choose your language carefully; it is possible to deliver negative news without being negative.

When you use language that conveys respect and avoids an accusing tone, you protect your audience's pride. This kind of communication etiquette is always important, but it demands special care with negative messages. Moreover, you can ease the sense of disappointment by using positive words rather than negative, counterproductive ones (see Table 8.1).

### STEP 3: COMPLETING NEGATIVE MESSAGES

The need for careful attention to detail continues as you complete your message. Revise your content to make sure everything is clear, complete, and concise—bearing in mind that even small flaws are likely to be magnified in readers' minds as they react to the negative news. Produce clean, professional documents and proofread carefully to eliminate mistakes. Finally, be sure to deliver messages promptly; withholding or delaying bad news can be unethical, even illegal.

## Using the Direct Approach for Negative Messages

**2** LEARNING OBJECTIVE
Explain how to use the direct approach effectively when conveying negative news.

A negative message using the direct approach opens with the bad news, proceeds to the reasons for the situation or decision, and ends with a positive statement aimed at maintaining a good relationship with the audience. Depending on the circumstances, the message may also offer alternatives or a plan of action to fix the situation under discussion. Stating the bad news at the beginning can have two advantages: (1) It makes a shorter message possible, and (2) it allows the audience to reach the main idea of the message in less time.

### OPENING WITH A CLEAR STATEMENT OF THE BAD NEWS

If you've chosen the direct approach to convey bad news, use the introductory paragraph of your message to share that information. To avoid being overly blunt, you can open with a neutral or positive statement that establishes common ground with the reader, then transition into the news. If necessary, remind the reader why you're writing.

### PROVIDING REASONS AND ADDITIONAL INFORMATION

The amount of detail you provide depends on your relationship with the audience.

In most cases, follow the direct opening with an explanation of why the news is negative. The extent of your explanation depends on the nature of the news and your relationship with the reader. For example, if you want to preserve a long-standing relationship with an important customer, a detailed explanation could well be worth the extra effort such a message would require.

However, you will encounter some situations in which explaining negative news is neither appropriate nor helpful, such as when the reasons are confidential, excessively complicated, or irrelevant to the reader.

Should you apologize when delivering bad news? The answer isn't quite as simple as one might think, partly because the notion of *apology* is hard to pin down. To some people, it simply means an expression of sympathy that something negative has happened to another person. At the other extreme, it means admitting fault and taking responsibility for specific compensations or corrections to atone for the mistake.

**REAL-TIME UPDATES**

LEARN MORE BY READING THIS ARTICLE

**Dissecting the apology letter from Target's CEO**

A PR consultant evaluates a high-profile apology point by point. Go to **http://real-timeupdates.com/bce7.** Under "Students," click on "Learn More."

Some experts contend that a company should never apologize, even when it knows it has made a mistake, as the apology might be taken as a confession of guilt that could be used against the company in a lawsuit. However, several states have laws that specifically prevent expressions of sympathy from being used as evidence of legal liability. In fact, judges, juries, and plaintiffs tend to be more forgiving of companies that express sympathy for wronged parties; moreover, an apology can help repair a company's reputation. Recently, some prosecutors have begun pressing executives to publicly admit guilt and apologize as part of the settlement of criminal cases—unlike the common tactic of paying fines but refusing to admit any wrongdoing.[3]

The best general advice in the event of a mistake or accident is to express sympathy immediately and sincerely and offer help, if appropriate, without admitting guilt; then seek the advice of your company's lawyers before elaborating. A straightforward, sincere apology can go a long way toward healing wounds and rebuilding relationships. As one report on the issue concluded, "The risks of making an apology are low, and the potential reward is high."[4]

The decision whether to apologize depends on a number of factors; if you do apologize, be sincere.

If you do apologize, make it a real apology. Don't say "I'm sorry if anyone was offended" by what you did—this statement implies that you're not sorry at all and that it's the other party's fault for being offended.[5] For example, when Target's information systems were infiltrated in a hacking attack that exposed the personal data of tens of millions of customers, the CEO's apology to customers included the statement, "I know this breach has had a real impact on you, creating a great deal of confusion and frustration."[6] Note that he did not say, "*if* this breach caused you any confusion or frustration."

Recognize that you can express sympathy with someone's plight without suggesting that you are to blame. For example, if a business customer damaged a product through misuse and suffered a financial loss as a result of not being able to use the product, you can say something along the lines of "I'm sorry to hear of your difficulties." This demonstrates sensitivity without accepting blame.

**REAL-TIME UPDATES**

LEARN MORE BY READING THIS INFOGRAPHIC

**See how expensive poor customer service really is**

Communication is at the heart of customer service, and poor customer service is the number-one way to drive customers away. Go to **http://real-timeupdates.com/bce7.** Under "Students," click on "Learn More."

### CLOSING ON A RESPECTFUL NOTE

After you've explained the negative news, close the message in a manner that respects the impact the negative news is likely to have on the recipient. If appropriate, consider offering your readers an alternative solution if you can and if doing so is a good use of your time. Look for opportunities to include positive statements, but avoid creating false hopes or writing in a way that seems to suggest that something negative didn't happen to the recipient. Ending on a false positive can leave readers feeling "disrespected, disregarded, or deceived."[7]

Close your message on a respectful note, being as positive as you can be without being insincere.

## Using the Indirect Approach for Negative Messages

**3** LEARNING OBJECTIVE
Explain how to use the indirect approach effectively when conveying negative news, and explain how to avoid ethical problems when using this approach.

As noted earlier, the indirect approach helps readers prepare for the bad news by outlining the reasons for the situation before presenting the bad news itself. However, the indirect approach is not meant to obscure bad news, delay it, or limit your responsibility. The

Use the indirect approach when some preliminary discussion will help your audience accept your bad news.

purpose of this approach is to ease the blow and help readers accept the news. When done poorly, the indirect approach can be disrespectful and even unethical. But when done well, it is a good example of audience-oriented communication crafted with attention to both ethics and etiquette. Showing consideration for the feelings of others is never dishonest.

## OPENING WITH A BUFFER

A buffer gives you the opportunity to start the communication process without jumping immediately into the bad news.

Messages using the indirect approach open with a **buffer**, a neutral, noncontroversial statement that is closely related to the point of the message but doesn't convey the bad news. Depending on the circumstances, a good buffer can express your appreciation for being considered, assure the reader of your attention to the request, indicate your understanding of the reader's needs, introduce the general subject matter, or simply establish common ground with your reader. A good buffer also needs to be relevant and sincere. In contrast, a poorly written buffer might trivialize the reader's concerns, divert attention from the problem with insincere flattery or irrelevant material, or mislead the reader into thinking your message actually contains good news.

Consider these possible responses to a manager of the order-fulfillment department who requested some temporary staffing help from your department (a request you won't be able to fulfill):

> Our department shares your goal of processing orders quickly and efficiently.
>
> As a result of the last downsizing, every department in the company is running shorthanded.
>
> You folks are doing a great job over there, and I'd love to be able to help out.
>
> Those new state labor regulations are driving me crazy over here; how about in your department?

Poorly written buffers mislead or insult the reader.

Only the first of these buffers can be considered effective; the other three are likely to damage your relationship with the other manager. Table 8.2 provides several types of effective buffers you can use to open a negative message tactfully.

**TABLE 8.2 Types of Buffers**

| Buffer Type | Strategy | Example |
|---|---|---|
| Agreement | Find a point on which you and the reader share similar views. | We both know how hard it is to make a profit in this industry. |
| Appreciation | Express sincere thanks for receiving something. | Your check for $127.17 arrived yesterday. Thank you. |
| Cooperation | Convey your willingness to help in any way you realistically can. | Employee Services is here to assist all associates with their health insurance, retirement planning, and continuing education needs. |
| Fairness | Assure the reader that you've closely examined and carefully considered the problem, or mention an appropriate action that has already been taken. | For the past week, we have had our bandwidth monitoring tools running around the clock to track your actual upload and download speeds. |
| Good news | Start with the part of your message that is favorable. | We have credited your account in the amount of $14.95 to cover the cost of return shipping. |
| Praise | Find an attribute or an achievement to compliment. | The Stratford Group clearly has an impressive record of accomplishment in helping clients resolve financial reporting problems. |
| Resale | Favorably discuss the product or company related to the subject of the letter. | With their heavy-duty, full-suspension hardware and fine veneers, the desks and file cabinets in our Montclair line have long been popular with value-conscious professionals. |
| Understanding | Demonstrate that you understand the reader's goals and needs. | So that you can more easily find the printer with the features you need, we are enclosing a brochure that describes all the Epson printers currently available. |

## PROVIDING REASONS AND ADDITIONAL INFORMATION

An effective buffer serves as a transition to the next part of your message, in which you build up the explanations and information that will culminate in your negative news. An ideal explanation section leads readers to your conclusion before you come right out and say it. The reader has followed your line of reasoning and is ready for the answer. By giving your reasons effectively, you help maintain focus on the issues at hand and defuse the emotions that always accompany significantly bad news. An effective way to do this is to start with positive or neutral points and move through progressively negative points. Provide enough detail for the audience to understand your reasons but be concise.

Build your reasoning in a way that signals the negative news ahead.

Avoid hiding behind company policy to cushion your bad news. If you say, "Company policy forbids our hiring anyone who does not have two years' supervisory experience," you imply that you won't consider anyone on his or her individual merits. Skilled and sympathetic communicators explain company policy (without referring to it as "policy") so that the audience can try to meet the requirements at a later time. Consider this response to an employee:

Whenever possible, don't use "company policy" as the reason for the bad news.

> Because these management positions are quite challenging, the human relations department has researched the qualifications needed to succeed in them. The findings show that the two most important qualifications are a bachelor's degree in business administration and two years' supervisory experience.

This paragraph does a good job of stating reasons for the refusal:

- It provides enough detail to logically support the refusal.
- It implies that the applicant is better off avoiding a position in which he or she might fail.
- It doesn't apologize for the decision because no one is at fault.
- It avoids negative personal statements (such as "You do not meet our requirements").

Well-written reasons are
- Detailed
- Tactful
- Personalized
- Unapologetic if the writer is not at fault
- As positive as possible

Even valid, well-thought-out reasons won't convince every reader in every situation, but if you've done a good job of laying out your reasoning, then you've done everything you can to prepare the reader for the main idea, which is the negative news itself.

## CONTINUING WITH A CLEAR STATEMENT OF THE BAD NEWS

After you've thoughtfully and logically established your reasons and readers are prepared to receive the bad news, you can use three techniques to convey the negative information as clearly and as kindly as possible. First, make sure you don't overemphasize the bad news:

- Minimize the space or time devoted to the bad news—without trivializing it or withholding important information. In other words, don't repeat it or belabor it.
- Subordinate bad news within a complex or compound sentence ("My department is already shorthanded, so I'll need all my staff for at least the next two months").
- Embed bad news in the middle of a paragraph or use parenthetical expressions ("Our profits, which are down, are only part of the picture").

To convey bad news carefully
- Deemphasize the bad news visually and grammatically
- Use a conditional statement if appropriate
- Tell what you did do, not what you didn't do

However, keep in mind that it's possible to abuse this notion of deemphasizing bad news. For instance, if the primary point of your message is that profits are down, it would be inappropriate to marginalize that news by burying it in the middle of a sentence. State the negative news clearly, and then make a smooth transition to any positive news that might balance the story.

Second, if appropriate, use a conditional (*if* or *when*) statement to imply that the audience could have received, or might someday receive, a favorable answer under different circumstances ("When you have more managerial experience, you are welcome to apply for any openings that we may have in the future"). Such a statement could motivate applicants to improve their qualifications. However, you must avoid any suggestion that you might reverse the decision you've just made or any phrasing that could give a rejected applicant false hope.

Don't disguise the bad news when you emphasize the positive.

Third, emphasize what you can do or have done rather than what you cannot do. Also, by implying the bad news, you may not need to actually state it, thereby making the bad news less personal ("Our development budget for next year is fully committed to our existing slate of projects"). However, make sure your audience understands the entire message—including the bad news. If an implied message might lead to uncertainty, state your decision in direct terms. Just be sure to avoid overly blunt statements that are likely to cause pain and anger:

| Instead of This | Write This |
|---|---|
| I *must refuse* your request. | I will be out of town on the day you need me. |
| We *must deny* your application. | The position has been filled. |
| I *am unable* to grant your request. | Contact us again when you have established . . . |
| We *cannot afford to* continue the program. | The program will conclude on May 1. |
| *Much as I would like to* attend . . . | Our budget meeting ends too late for me to attend. |
| We *must turn down* your extension request. | Please send in your payment by June 14. |

### CLOSING ON A RESPECTFUL NOTE

As in the direct approach, the close in the indirect approach offers an opportunity to emphasize your respect for your audience, even though you've just delivered unpleasant news. Express best wishes without ending on a falsely upbeat note. If you can find a positive angle that's meaningful to your audience, by all means consider adding it to your conclusion. However, don't try to pretend that the negative news didn't happen or that it won't affect the reader. Suggest alternative solutions if such information is available and doing so is a good use of your time. If you've asked readers to decide between alternatives or to take some action, make sure that they know what to do, when to do it, and how to do it. Whatever type of conclusion you use, follow these guidelines:

A respectful close
- Builds goodwill
- Offers a suggestion for action
- Provides a look toward the future
- Is sincere

- **Avoid an uncertain conclusion.** If the situation or decision is final, avoid statements such as "I trust our decision is satisfactory," which imply that the matter is open to discussion or negotiation.
- **Manage future correspondence.** Encourage additional communication *only* if you're willing to discuss your decision further. If you're not, avoid wording such as "If you have further questions, please write."
- **Express optimism, if appropriate.** If the situation might improve in the future, share that with your readers if it's relevant. However, don't suggest the possibility of a positive change if you don't have insight that it might happen.
- **Be sincere.** Avoid clichés that are insincere in view of the bad news. If you can't help, don't say, "If we can be of any help, please contact us."

Keep in mind that the close can have a lasting impact on your audience. Even though they're disappointed, leave them with the impression that they were treated with respect.

## Sending Negative Messages on Routine Business Matters

4 LEARNING OBJECTIVE
Describe successful strategies for sending negative messages on routine business matters.

Professionals and companies receive a wide variety of requests and cannot respond positively to every single one. In addition, mistakes and unforeseen circumstances can lead to delays and other minor problems that occur in the course of business. Occasionally, companies must send negative messages to suppliers and other parties. Whatever the purpose, crafting routine negative responses and messages quickly and graciously is an important skill for every businessperson.

## MAKING NEGATIVE ANNOUNCEMENTS ON ROUTINE BUSINESS MATTERS

Many negative messages are written in response to requests from an internal or external correspondent, but on occasion managers need to make unexpected announcements of a negative nature. For example, a company might decide to consolidate its materials purchasing with fewer suppliers and thereby need to tell several firms it will no longer be buying from them. Internally, management may need to announce the elimination of an employee benefit or other changes that employees will view negatively.

Although such announcements happen in the normal course of business, they are generally unexpected. Accordingly, except in the case of minor changes, the indirect approach is usually the better choice. Follow the steps outlined for indirect messages: open with a buffer that establishes some mutual ground between you and the reader, advance your reasoning, announce the change, and close with as much positive information and sentiment as appropriate under the circumstances.

For unexpected negative messages on routine matters, the indirect approach is usually more appropriate.

## REJECTING SUGGESTIONS AND PROPOSALS

Managers receive a variety of suggestions and proposals, both solicited and unsolicited, from internal and external sources. For an unsolicited proposal from an external source, you may not even need to respond if you don't already have a working relationship with the sender. However, if you need to reject a proposal you solicited, you owe the sender an explanation, and because the news will be unexpected, the indirect approach is better. In general, the closer your working relationship, the more thoughtful and complete you need to be in your response. For example, if you are rejecting a proposal from an employee, explain your reasons fully and carefully so that the employee can understand why the proposal was not accepted and so that you don't damage an important working relationship.

Rejecting suggestions and proposals, particularly if you asked for input, requires special care and tact because you need to maintain a positive working relationship.

## REFUSING ROUTINE REQUESTS

When you are unable to meet a routine request, your primary communication challenge is to give a clear negative response without generating negative feelings or damaging either your personal reputation or the company's. As simple as these messages may appear to be, they can test your skills as a communicator because you often need to deliver negative information while maintaining a positive relationship with the other party.

The direct approach works best for most routine negative responses because it is simpler and more efficient. The indirect approach works best when the stakes are high for you or for the receiver, when you or your company has an established relationship with the person making the request, or when you're forced to decline a request that you might have accepted in the past (see Figure 8.3 on the next page).

When turning down an invitation or a request for a favor, consider your relationship with the reader.

Consider the following points as you develop routine negative messages:

- Manage your time carefully; focus on the most important relationships and requests.
- If the matter is closed, don't imply that it's still open by using phrases such as "Let me think about it and get back to you" as a way to delay saying no.
- Offer alternative ideas if you can, particularly if the relationship is important.
- Don't imply that other assistance or information might be available if it isn't.

If you aren't in a position to offer additional information or assistance, don't imply that you are.

## HANDLING BAD NEWS ABOUT TRANSACTIONS

Bad news about transactions is always unwelcome and usually unexpected. When you send such messages, you have three goals: (1) modify the customer's expectations, (2) explain how you plan to resolve the situation, and (3) repair whatever damage might have been done to the business relationship.

The specific content and tone of each message can vary widely, depending on the nature of the transaction and your relationship with the customer. Telling an individual consumer that his new sweater will be arriving a week later than you promised is a much simpler task than telling Toyota that 30,000 transmission parts will be a week

Some negative messages regarding transactions carry significant business ramifications.

## 1 Plan →

### Analyze the Situation

Verify that the purpose is to decline a request and offer alternatives; audience is likely to be surprised by the refusal.

### Gather Information

Determine audience needs and obtain the necessary information.

### Choose Medium and Channel

For formal messages, printed letters on company letterhead are best.

### Organize the Information

The main idea is to refuse the request so limit your scope to that; select the indirect approach based on the audience and the situation.

## 2 Write →

### Adapt to Your Audience

Adjust the level of formality based on your degree of familiarity with the audience; maintain a positive relationship by using the "you" attitude, politeness, positive emphasis, and bias-free language.

### Compose the Message

Use a conversational but professional style and keep the message brief, clear, and as helpful as possible.

## 3 Complete

### Revise the Message

Evaluate content and review readability to make sure the negative information won't be misinterpreted; make sure your tone stays positive without being artificial.

### Produce the Message

Maintain a clean, professional appearance on company letterhead.

### Proofread the Message

Review for errors in layout, spelling, and mechanics.

### Distribute the Message

Deliver your message using the chosen medium.

InfoTech
927 Dawson Valley Road, Tulsa, Oklahoma 74151
Voice: (918) 669-4428 Fax: (918) 669-4429
www.infotech.com

March 6, 2015

Dr. Sandra Wofford, President
Whittier Community College
333 Whittier Avenue
Tulsa, OK 74150

Dear Dr. Wofford:

The buffer eases the recipient into the message by demonstrating respect and recapping the request.

Infotech has been happy to support Whittier Community College in many ways over the years, and we appreciate the opportunities you and your organization provide to so many deserving students. Thank you for considering our grounds for your graduation ceremony on June 3.

She provides a meaningful reason for the negative response, without apologizing (because the company is not at fault).

We would certainly like to accommodate Whittier as we have in years past, but our companywide sales meetings will be held this year during the weeks of May 29 and June 5. With more than 200 sales representatives and their families from around the world joining us, activities will be taking place throughout our facility.

Kwan suggests an alternative, showing that she cares about the college and has given the matter some thought.

My assistant, Robert Seagers, suggests you contact the Municipal Botanical Gardens as a possible graduation site. He recommends calling Jerry Kane, director of public relations.

Her close emphasizes the importance of the relationship and the company's continuing commitment.

We remain firm in our commitment to you, President Wofford, and to the fine students you represent. Through our internship program, academic research grants, and other initiatives, we will continue to be a strong corporate partner to Whittier College and will support your efforts as you move forward.

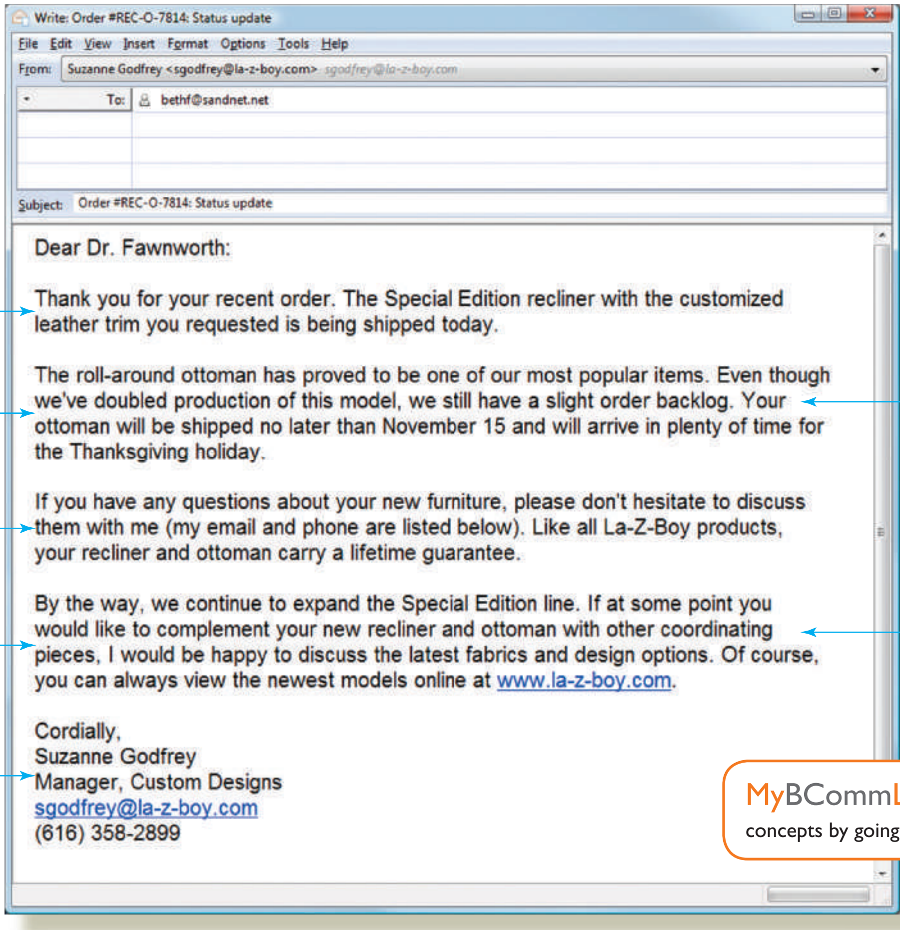
Sincerely,

May Yee Kwan

May Yee Kwan
Public Relations Director

lc

**Figure 8.3 Effective Letter Declining a Routine Request**
In declining a request to use her company's facilities, May Yee Kwan took note of the fact that her company has a long-standing relationship with the college and wants to maintain that positive relationship. Because the news is unexpected based on past experience, she chose an indirect approach to build up to her announcement.




Godfrey uses the buffer to convey the good news.

These two sentences imply the forthcoming bad news by telling the reader what's being done, not what can't be done.

The body and close foster a positive ongoing relationship by inviting inquiries and reminding the customer of a key benefit.

She includes helpful contact information.

She explains the delay and immediately cushions bad news with a pledge to ship by a definite time.

This resale information encourages future purchasing, but in a way that addresses the customer's needs, not La-Z-Boy's.

MyBCommLab Apply Figure 8.4's key concepts by going to **mybcommlab.com**

**Figure 8.4 Effective Negative Message Regarding a Transaction**
This message, which is a combination of good and bad news, uses the indirect approach—with the good news serving as a buffer for the bad news. In this case, the customer wasn't promised delivery by a certain date, so the writer simply informs the customer when to expect the rest of the order. The writer also takes steps to repair the relationship and encourage future business with her firm.

late, especially when you know the company will be forced to idle a multimillion-dollar production facility as a result.

If you haven't done anything specific to set the customer's expectations—such as promising delivery within 24 hours—the message simply needs to inform the customer of the situation, with little or no emphasis on apologies (see Figure 8.4).

Your approach to bad news about business transactions depends on the customer's expectations.

If you did set the customer's expectations and now find that you can't meet them, your task is more complicated. In addition to resetting those expectations and explaining how you'll resolve the problem, you may need to include an element of apology. The scope of the apology depends on the magnitude of the mistake. For the customer who ordered the sweater, a simple apology followed by a clear statement of when the sweater will arrive would probably be sufficient. For larger business-to-business transactions, the customer may want an explanation of what went wrong to determine whether you'll be able to perform as you promise in the future.

If you've failed to meet expectations that you set for the customer, an element of apology should be considered.

To help repair the damage to the relationship and encourage repeat business, many companies offer discounts on future purchases, free merchandise, or other considerations. Even modest efforts can go a long way to rebuilding a customer's confidence in your company.

**MOBILE APPS**
Pocket Letter Pro includes templates for a variety of letter types to simplify writing business letters on your mobile device.

## REFUSING CLAIMS AND REQUESTS FOR ADJUSTMENT

Customers who make a claim or request an adjustment tend to be emotionally involved, so the indirect approach is usually the better choice when you are denying such a request. Your delicate task as a writer is to avoid accepting responsibility for the unfortunate situation and

Use the indirect approach in most cases of refusing a claim.

yet avoid blaming or accusing the customer. To steer clear of these pitfalls, pay special attention to the tone of your letter. Demonstrate that you understand and have considered the complaint carefully, and then rationally explain why you are refusing the request. Close on a respectful and action-oriented note (see Figure 8.5). And be sure to respond quickly. With so many instantaneous media choices at their disposal, some angry consumers will take their complaints public if they don't hear back from you within a few days or even a few hours.[8]

If you deal with enough customers over a long-enough period, chances are you'll get a request that is particularly outrageous. You may even be convinced that the person is not telling the truth. However, you must resist the temptation to call the person dishonest or incompetent. If you don't, you could be sued for **defamation**, a false statement that damages someone's reputation. (Written defamation is called *libel*; spoken defamation is called *slander*.) To successfully sue for defamation, the aggrieved party must prove (1) that the statement is false, (2) that the language injures the person's reputation, and (3) that the statement has been communicated to others.

To avoid accusations of defamation, follow these guidelines:

You can help avoid accusations of defamation by not responding emotionally.

- Avoid using any kind of abusive language or terms that could be considered defamatory.
- Provide accurate information and stick to the facts.
- Never let anger or malice motivate your messages.
- Consult your company's legal advisers whenever you think a message might have legal consequences.
- Communicate honestly and make sure you believe what you're saying is true.
- Emphasize a desire for a good relationship in the future.

Keep in mind that nothing positive can come out of antagonizing a customer, even one who has verbally abused you or your colleagues. Reject the claim or request for adjustment in a professional manner and move on to the next challenge.

## Sending Negative Employment Messages

**5 LEARNING OBJECTIVE** Describe successful strategies for sending negative employment-related messages.

As a manager, you will find yourself in a variety of situations in which you have to convey bad news to individual employees or potential employees. Recipients have an emotional stake in these messages, so taking the indirect approach is usually advised. In addition, use great care in choosing your medium for each situation. For instance, email and other written forms let you control the message and avoid personal confrontation, but one-on-one conversations are often viewed as more sensitive and give both sides the opportunity to ask and answer questions.

### REFUSING REQUESTS FOR RECOMMENDATIONS

In messages informing prospective employers that you will not provide a recommendation, be direct, brief, and factual (to avoid legal pitfalls).

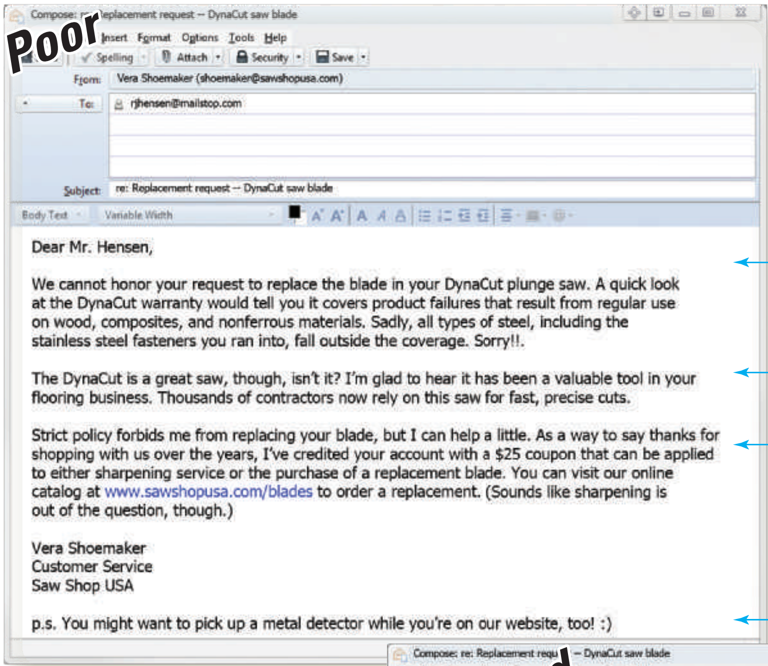
Managers may get requests for recommendations from other employers and from past employees. When sending refusals to other employers who have requested information about a former employee of yours, your message can be brief and direct:

> Our human resources department has authorized me to confirm that Yolanda Johnson worked for Tandy, Inc., for three years, from June 2010 to July 2013. Best of luck as you interview applicants.

This message doesn't need to say, "We cannot comply with your request." It simply gives the reader all the information that is allowable.

Refusing an applicant's direct request for a recommendation letter is another matter. Any refusal to cooperate may seem to be a personal slight and a threat to the applicant's future. Diplomacy and preparation help readers accept your refusal:

> Thank you for letting me know about your job opportunity with Coca-Cola. Your internship there and the MBA you've worked so hard to earn should place you in an excellent position to land the marketing job.


Poor

Compose: re: Replacement request – DynaCut saw blade

From: Vera Shoemaker (shoemaker@sawshopusa.com)

To: rjhensen@mailstop.com

Subject: re: Replacement request – DynaCut saw blade

Dear Mr. Hensen,

We cannot honor your request to replace the blade in your DynaCut plunge saw. A quick look at the DynaCut warranty would tell you it covers product failures that result from regular use on wood, composites, and nonferrous materials. Sadly, all types of steel, including the stainless steel fasteners you ran into, fall outside the coverage. Sorry!!.

The DynaCut is a great saw, though, isn't it? I'm glad to hear it has been a valuable tool in your flooring business. Thousands of contractors now rely on this saw for fast, precise cuts.

Strict policy forbids me from replacing your blade, but I can help a little. As a way to say thanks for shopping with us over the years, I've credited your account with a $25 coupon that can be applied to either sharpening service or the purchase of a replacement blade. You can visit our online catalog at www.sawshopusa.com/blades to order a replacement. (Sounds like sharpening is out of the question, though.)

Vera Shoemaker
Customer Service
Saw Shop USA

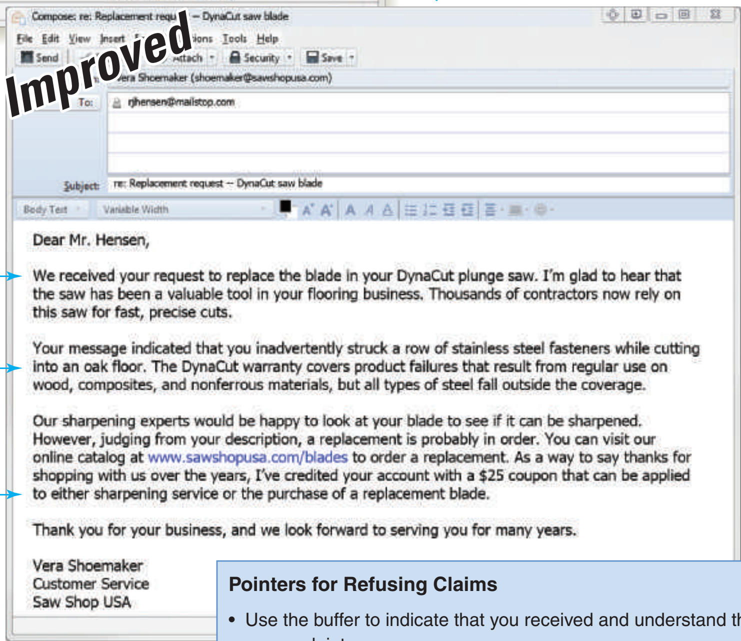
p.s. You might want to pick up a metal detector while you're on our website, too! :)

The direct approach is not the right choice for this message, and the opening is way too blunt, even for the direct approach. The second sentence is somewhat insulting, and "Sadly" and "Sorry!!" sound unprofessional.

This upbeat paragraph, coming immediately after the disappointing and insulting opening, will only annoy the reader.

The information about the $25 coupon is positive and presented well. However, hiding behind "policy" in the first sentence only tells the reader that the company is unwilling to consider each customer's needs individually.

This misguided attempt at humor is insulting. The reader already knows about the problem; he wants a solution.


Improved

Compose: re: Replacement request – DynaCut saw blade

From: Vera Shoemaker (shoemaker@sawshopusa.com)

To: rjhensen@mailstop.com

Subject: re: Replacement request – DynaCut saw blade

Dear Mr. Hensen,

We received your request to replace the blade in your DynaCut plunge saw. I'm glad to hear that the saw has been a valuable tool in your flooring business. Thousands of contractors now rely on this saw for fast, precise cuts.

Your message indicated that you inadvertently struck a row of stainless steel fasteners while cutting into an oak floor. The DynaCut warranty covers product failures that result from regular use on wood, composites, and nonferrous materials, but all types of steel fall outside the coverage.

Our sharpening experts would be happy to look at your blade to see if it can be sharpened. However, judging from your description, a replacement is probably in order. You can visit our online catalog at www.sawshopusa.com/blades to order a replacement. As a way to say thanks for shopping with us over the years, I've credited your account with a $25 coupon that can be applied to either sharpening service or the purchase of a replacement blade.

Thank you for your business, and we look forward to serving you for many years.

Vera Shoemaker
Customer Service
Saw Shop USA

The opening confirms the customer's claim, letting him know his request has been considered. Notice also how the writer confirms the high level of satisfaction with the product in general—signaling that the situation at hand is not a product problem.

The second paragraph offers more confirmation that the reader's message was heard. The description of the warranty lays out the reasoning for the refusal, which is presented indirectly at the end of the paragraph.

The writer continues with helpful advice and the offer of a $25 discount, and then concludes on a positive, respectful note.

**Pointers for Refusing Claims**

- Use the buffer to indicate that you received and understand the request or complaint
- In the body, provide an accurate, objective account of the transaction.
- Make the refusal clear without being abrupt, insulting, or accusatory.
- Maintain an impersonal tone that doesn't offend the reader.
- Don't apologize for refusing, since your company hasn't done anything wrong.
- If appropriate, offer an alternative solution.
- Emphasize your continued desire for a positive relationship with the customer.
- Include resale information if appropriate.
- Make any suggested actions easy for the reader to follow.

**Figure 8.5 Message to Refuse a Claim**
Vera Shoemaker diplomatically refuses this customer's request for a new saw blade. Without blaming the customer (even though the customer clearly made a mistake), she points out that the saw blade is not intended to cut steel, so the warranty doesn't cover a replacement in this instance.

Although we do not send out formal recommendations here at PepsiCo, I can certainly send Coca-Cola a confirmation of your employment dates. And if you haven't considered this already, be sure to ask several of your professors to write evaluations of your marketing skills. Best of luck to you in your career.

This message tactfully avoids hurting the reader's feelings because it makes positive comments about the reader's recent activities, implies the refusal, suggests an alternative, and uses a polite close.

## REFUSING SOCIAL NETWORKING RECOMMENDATION REQUESTS

Making recommendations in a social networking environment is more complicated than with a traditional recommendation letter because the endorsements you give become part of your online profile. On a network such as LinkedIn, others can see whom you've recommended and what you've written about these people. Much more so than with traditional letters, then, the recommendations you make in a social network become part of your personal brand.[9] Moreover, networks make it easy to find people and request recommendations, so chances are you will get more requests than you would have otherwise—and sometimes from people you don't know well.

Social networks have created new challenges in recommendation requests, but they also offer more flexibility in responding to these requests.

Fortunately, social networks give you a bit more flexibility when it comes to responding to these requests. One option is to simply ignore or delete the request. Of course, if you do know a person, ignoring a request could create an uncomfortable situation, so you will need to decide each case based on your relationship with the requester. Another option is to refrain from making recommendations at all, and just let people know this policy when they ask. Whatever you decide, remember that it is your choice.[10]

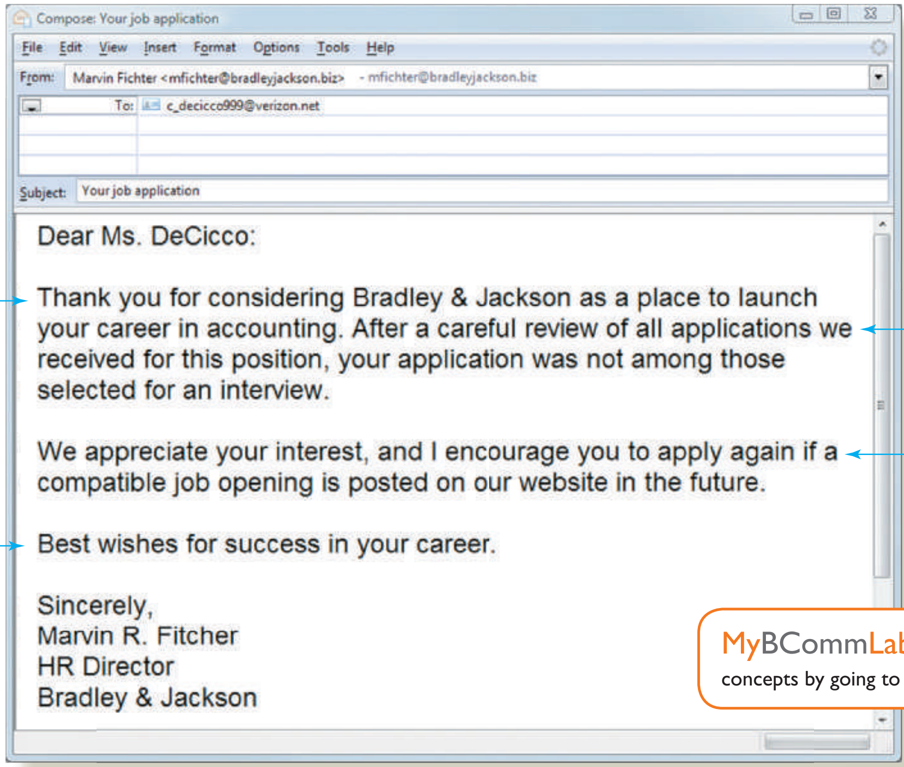
If you choose to make recommendations and want to respond to a request, you can write as much or as little information about the person as you are comfortable sharing. Unlike the situation with an offline recommendation, you don't need to write a complete letter. You can write a brief statement, even just a single sentence that focuses on one positive aspect.[11] This flexibility allows you to respond positively in those situations in which you have mixed feelings about a person's overall abilities.

## REJECTING JOB APPLICATIONS

Experts disagree on which elements to include in a rejection letter, but the safest strategy is a minimalist approach.

Application rejections are routine communications, but saying no is never easy, and recipients are emotionally invested in the decision. Moreover, companies must be aware of the possibility of employment discrimination lawsuits, which have been on the rise in recent years.[12] Of course, having fair and nondiscriminatory hiring practices is essential, but rejections must also be written in a way that doesn't inadvertently suggest any hint of discrimination. Expert opinions differ on the level of information to include in a rejection message, but the safest strategy is to avoid sharing any explanations for the company's decision and to avoid making or implying any promises of future consideration (see Figure 8.6):[13]

- **Personalize the message by using the recipient's name.** "Dear Applicant" can make it sound as though you never bothered to read the application.
- **Open with a courteous expression of appreciation for having applied.** In a sense, this is like the buffer in an indirect message because it gives you an opportunity to begin the conversation without immediately and bluntly telling the reader that his or her application has been rejected.
- **Convey the negative news politely and concisely.** The passive voice is helpful in this situation because it depersonalizes the response. For example, "Your application was not among those selected for an interview" is less blunt than the active phrase "We have rejected your application."
- **Avoid explaining why an applicant was rejected or why other applicants were chosen instead.** Although it was once more common to offer such explanations, and some experts still advocate this approach, the simplest strategy from a legal standpoint is to avoid offering reasons for the decision. Avoiding explanations lowers the possibility


Compose: Your job application

File Edit View Insert Format Options Tools Help

From: Marvin Fichter <mfichter@bradleyjackson.biz> - mfichter@bradleyjackson.biz

To: c_decicco999@verizon.net

Subject: Your job application

Dear Ms. DeCicco:

Thank you for considering Bradley & Jackson as a place to launch your career in accounting. After a careful review of all applications we received for this position, your application was not among those selected for an interview.

We appreciate your interest, and I encourage you to apply again if a compatible job opening is posted on our website in the future.

Best wishes for success in your career.

Sincerely,
Marvin R. Fitcher
HR Director
Bradley & Jackson



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**Figure 8.6 Effective Message Rejecting a Job Applicant**
This message rejecting a job applicant takes care to avoid making or implying any promises about future opportunities, beyond inviting the person to apply for positions that may appear in the future. Note that this would not be appropriate if the company did not believe the applicant was a good fit for the company in general.

that an applicant will perceive discrimination in the hiring decision or be tempted to challenge the reasons given.

- **Don't state or imply that the application will be reviewed at a later date.** Saying that "we will keep your résumé on file for future consideration" can create false hopes for the recipient and leave the company vulnerable to legal complaints if a future hiring decision is made without actually reviewing this candidate's application again. If the candidate might be a good fit for another position in the company in the future, you can suggest he or she reapply if a new job opening is posted.
- **Close with positive wishes for the applicant's career success.** A brief statement such as "We wish you success in your career" is sufficient.

Naturally, you should adjust your tactics to the circumstances. A simple and direct written message is fine when someone has only submitted a job application, but a phone call might be more appropriate for rejecting a candidate who has made it at least partway through the interview process.

## GIVING NEGATIVE PERFORMANCE REVIEWS

**Performance reviews** are designed to clarify job requirements, give employees feedback on their performance relative to those requirements, and establish a personal plan of action to ensure continued performance in the future. Performance reviews also help companies set organizational standards and communicate organizational values.[14] In addition, they document evidence of performance in the event that disciplinary action is needed or an employee later disputes management decisions regarding pay or promotions.[15]

By giving employees clear goals and regular feedback, you can help avoid unpleasant surprises in a performance review.

The worst possible outcome in an annual review is a negative surprise, such as when an employee has been working toward different goals than the manager expects or has been underperforming throughout the year but didn't receive any feedback or improvement coaching along the way.[16] To avoid negative surprises, managers should provide regular feedback and coaching as needed throughout the year if employee performance falls below expectations. In fact, some companies have gone so far as to abandon the traditional performance review altogether. The online retailer Zappos, for example, has replaced annual performance reviews with frequent status reports that give employees feedback on routine job tasks and an annual assessment of how well each employee embodies the company's core values.[17]

Regardless of the specific approach a company takes, writing an effective performance review requires careful, objective assessment and a clear statement of how well an employee has done relative to agreed-upon goals. If you need to write a review that includes negative information, keep the following points in mind:[18]

Negative evaluations should provide careful documentation of performance concerns.

- **Document performance problems in detail as they happen.** You will need this information to write an effective appraisal and to support any decisions that need to be made about pay, promotions, or termination.
- **Evaluate all employees consistently.** Consistency is not only fair but also helps protect the company from claims of discriminatory practices.
- **Maintain a calm, objective tone.** Manage the emotions of the situation by maintaining professional reserve in your writing.
- **Focus on opportunities for improvement.** This information can serve as the foundation for an improvement plan for the coming year.
- **Keep job descriptions up to date.** If a job evolves over time in response to changes in the business, the employees' current activities may no longer match an outdated job description.

### TERMINATING EMPLOYMENT

If an employee's performance cannot be brought up to company standards or if other factors such as declining sales cause a reduction in the workforce, a company often has no choice but to terminate employment. As with other negative employment messages, termination is fraught with emotions and legal ramifications, so careful planning, complete documentation, and sensitive writing are essential.

Termination messages should always be written with input from the company's legal staff, but here are general writing guidelines to bear in mind:[19]

Carefully word a termination letter to avoid creating undue ill will and grounds for legal action.

- Clearly present the reasons for this difficult action, whether it is the employee's performance or a business decision unrelated to performance.
- Make sure the reasons are presented in a way that cannot be construed as unfair or discriminatory.
- Follow company policy, contractual requirements, and applicable laws to the letter.
- Avoid personal attacks or insults of any kind.
- Ask another manager to review the letter before issuing it. An objective reviewer who isn't directly involved might spot troublesome wording or faulty reasoning.
- Deliver the termination letter in person if at all possible. Arrange a meeting that will ensure privacy and freedom from interruptions.

Any termination is clearly a negative outcome for the employee, but careful attention to content and tone in the termination message can help the employee move on gracefully and minimize the misunderstandings and anger that can lead to expensive lawsuits.

## Sending Negative Organizational News

6 LEARNING OBJECTIVE
List the important points to consider when conveying negative organizational news.

As a manager or business owner, you may at times need to issue negative announcements regarding some aspect of your products, services, or operations. Unlike routine negative announcements, these messages involve significant changes that negatively affect one or more groups (such as losing a major contract or canceling a popular product), announcements of workforce reductions, project cancelations, and crisis communication regarding environmental incidents, workplace accidents, or other traumatic situations (see Figure 8.7).

**Poor**

Pulling the plug on Triton

JUNE 6, 2015 BY OSCAR HUERTA LEAVE A COMMENT

Many of you probably don't follow the costs of materials on the world market, but let me tell you, it's been brutal for those of us who do. We're seeing some major increases in the cost of high-grade steel, ceramics, and semiconductor-grade silicon. We can accommodate moderate increases in these costs by raising our list prices, but there's only so far we can raise prices before sales start to drop.

Of course, we periodically revisit our sales forecasts for products in development, to make sure our revenue projections are valid as well. Sad to say, Triton looks like it will get hammered when it hits the market. AMG Magnetics recently introduced a product that will compete directly with Triton, and it has both higher performance and a lower price.

This won't come as a surprise to anyone who has been looking at the numbers: we had to pull the plug on Triton. It just won't fly under these new circumstances.

Now, I don't want to hear any gossip about the Triton team failing or not being up to the task or whatever. Sue Wentworth and her crew have been putting in long hours for months, and it was tough for me at the other top managers to deliver this news.

Disruptions like this always start the rumor mill going about job security, so I'm happy to report that there is no need to worry. We have plenty of other projects that could use some extra help, and other project managers are already lobbying to get their hands on the Triton staffers.

By the way, these reviews are something the management team does every quarter to make sure we focus our time and investment on new products with the greatest potential for strong sales and profit levels, the management team reviews the costing analysis and sales projections for every R&D project once a quarter. Sometimes circumstances change after we launch a project, and the financial assumptions we made at that point might no longer be valid.

The writer attempts the indirect approach in the body of the message but gives away the bad news in the headline of the blog post.

This opening makes it more about the writer than the readers or the company in general.

Saying that Triton "will get hammered when it hits the market" is too blunt for such a sensitive message.

He started the post by saying most people don't look at the numbers, so this news will come as a surprise. Also, "pull the plug" and "It just won't fly" feel too flippant for such an important message.

These statements about gossip and the rumor mill are uncalled for and introduce additional layers of negativity that serve no purpose.

This information would make a good buffer (see the Improved example), but it makes a poor close because it doesn't leave the reader with anything to feel good about.

**Improved**

Triton project: important update

JUNE 6, 2015 BY OSCAR HUERTA LEAVE A COMMENT

As part of the ongoing effort to make sure we focus our time and investment on new products with the greatest potential for strong sales and profit levels, the management team reviews the costing analysis and sales projections for every R&D project once a quarter. Conducting these reviews every quarter gives us time to respond in the event that current circumstances no longer align with the financial assumptions we made when a particular project was launched.

On the cost side of the equation, we're seeing some major increases in the cost of high-grade steel, ceramics, and semiconductor-grade silicon. We can accommodate moderate increases in these costs by raising our list prices, but there's only so far we can raise prices before sales start to drop.

Regarding sales projections, our forecasts still look solid for every new product, except for the Triton project. AMG Magnetics recently introduced a product that will compete directly with Triton, and it has both higher performance and a lower price. Accordingly, we have had to reduce Triton's sales forecasts by 35 percent.

Unfortunately, the increase in material costs and the decrease in projected sales volume put Triton in an impossible position. We believe the company has better opportunities for investing our development capital and the time and energy of our talented engineering staff. Accordingly, we have decided to cancel Triton, effectively immediately.

Please rest assured that this will not affect staffing levels. We have plenty of other projects that can use some extra help, and other project managers are already lobbying to get the Triton staffers on their teams.

Please join me in thanking Sue Wentworth and everyone on the Triton team for the months of dedication and creativity they devoted to this project. I know they are disappointed in this outcome but recognize the necessity of focusing on our brightest prospects.

The post title preserves the indirect approach by not giving away the bad news.

The opening serves as an effective buffer because it explains the process that was used to reach the decision. This will put the audience in a rational frame of mind, rather than an emotional one.

This paragraph introduces the first of the two reasons that led to the decision, and it does so in a calm but authoritative way.

This paragraph introduces the second reason and narrows the focus from all products to just the Triton project. At this point, all readers should be prepared for the bad news.

He delivers the bad news while keeping the focus on the project and its financial parameters. He also immediately shifts into a positive stance, talking about the talented staff and other opportunities.

This paragraph immediately puts to rest any worries other readers will have about their jobs.

The close is respectful and demonstrates sensitivity toward the people most affected by the decision.

**Figure 8.7 Internal Message Providing Bad News About Company Operations**

The cancellation of a major development project before completion can be a traumatic event for a company's employees. People who worked on the project are likely to feel that all their time and energy were wasted and worry that their jobs are in jeopardy. Employees who didn't work on the project might worry about the company's financial health and the stability of their own jobs. Such messages are therefore prime candidates for the indirect approach. Note how much more effectively the revised version manages the reader's emotions from beginning to end.

Negative organizational messages to external audiences often require extensive planning.

When making negative announcements, follow these guidelines:

- **Match your approach to the situation.** For example, in an emergency such as product tampering or a toxic spill, get to the point immediately and make sure all affected parties get the information they need.
- **Consider the unique needs of each group.** When a company or facility closes, for instance, employees need time to find new jobs, customers may need to find new

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**Communication pros discuss the latest events in crisis communication**
Situations with US Airways, Target, and SeaWorld are among the high-profile events you can learn more about. Go to **http://real-timeupdates.com/bce7.** Under "Students," click on "Learn More."

suppliers, and community leaders may need to be prepared to help people who have lost their jobs.

- **Minimize the element of surprise whenever possible.** Give affected groups as much time as possible to prepare and respond.
- **If possible, give yourself enough time to plan and manage a response.** Make sure you're ready with answers to potential questions.
- **Look for positive angles but don't exude false optimism.** Laying off 10,000 people does not give them "an opportunity to explore new horizons." It's a traumatic event that can affect employees, their families, and their communities for years. The best you may be able to do is thank people for their past support and wish them well in the future.

Give people as much time as possible to react to negative news.

Ask for legal help and other assistance if you're not sure how to handle a significant negative announcement.

- **Seek expert advice.** Many significant negative announcements have important technical, financial, or legal elements that require the expertise of lawyers, accountants, or other specialists.
- **Use multiple channels to reach out to affected audiences.** Provide information through your normal communication network, such as your company website, Facebook page, and Twitter account, but also reach out and participate in conversations that are taking place elsewhere in the social media landscape.[20]
- **Be open and be transparent.** Mark Price, managing director of the UK grocery chain Waitrose, puts it perfectly: "We recognize that we have to be increasingly open and transparent. You can't close down businesses now; you can't bunker up if there's a problem. You've got to go the other way."[21]

Negative situations give you an opportunity to excel as a communicator and as a business leader. Inspirational leaders try to seize such situations as opportunities to reshape or reinvigorate the organization, and they offer encouragement to those around them.

## Responding to Negative Information in a Social Media Environment

7 LEARNING OBJECTIVE
Describe an effective strategy for responding to negative information in a social media environment.

For all the benefits they bring to business, social media and other communication technologies have created a major new challenge: responding to online rumors, false information, and attacks on a company's reputation. Customers who believe they have been treated unfairly like these sites and tools because they can use the public exposure as leverage. Most companies appreciate the feedback, too, and many actively seek out complaints to improve their products and operations.

However, false rumors and both fair and unfair criticisms can spread around the world in a matter of minutes. Responding to rumors and countering negative information requires an ongoing effort and case-by-case decisions about which messages require a response. Follow these four steps:[22]

Responding effectively to rumors and negative information in social media requires continual engagement with stakeholders and careful decision making about which messages should get a response.

1. **Engage early, engage often.** The most important step in responding to negative information has to be done *before* the negative information appears, and that is to engage with communities of stakeholders as a long-term strategy. Companies that have active, mutually beneficial relationships with customers and other interested parties are less likely to be attacked unfairly online and more likely to survive such attacks if they do occur. In contrast, companies that ignore constituents or jump into "spin doctoring" mode when a negative situation occurs don't have the same credibility as companies that have done the long, hard work of fostering relationships within their physical and online communities.
2. **Monitor the conversation.** If people are interested in what your company does, chances are they are blogging, tweeting, podcasting, posting videos, writing on

**REAL-TIME UPDATES**
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**Positive ways to engage when you pick up negative social commentary**
Aetna's Lauren Vargas talks about the challenges of moving a large corporation in a heavily regulated industry (health insurance) into social media, including the best ways to respond to negative comments online. Go to **http://real-timeupdates.com/bce7.** Under "Students," click on "Learn More."

Facebook walls, and otherwise sharing their opinions. Use automated reputation analysis and other technologies to listen to what people are saying.

3. **Evaluate negative messages.** When you encounter negative messages, resist the urge to fire back immediately. Instead, evaluate the source, the tone, and the content of the message and then choose a response that fits the situation. For example, the Public Affairs Agency of the U.S. Air Force groups senders of negative messages into four categories, including "trolls" (those whose only intent is to stir up conflict), "ragers" (those who are just ranting or telling jokes), "the misguided" (those who are spreading incorrect information), and "unhappy customers" (those who have had a negative experience with the Air Force).
4. **Respond appropriately.** After you have assessed a negative message, quickly make the appropriate response based on an overall public relations plan. The Air Force, for instance, doesn't respond to trolls or ragers, responds to misguided messages with correct information, and responds to unhappy customers with efforts to rectify the situation and reach a reasonable solution. In addition to replying promptly, make sure your response won't make the situation even worse. For example, taking legal action against critics, even if technically justified, can rally people to their defense and create a public relations nightmare. In some instances, the best response can be to contact a critic privately (through direct messaging on Twitter, for example) to attempt a resolution away from the public forum.

Whatever you do, keep mind that positive reputations are an important asset and need to be diligently guarded and defended. Everybody has a voice now, and some of those voices don't care to play by the rules of ethical communication.

For more information on writing negative messages, visit **http://real-timeupdates.com/bce7** and click on Chapter 8.

**REAL-TIME UPDATES**

LEARN MORE BY READING THIS INFOGRAPHIC

**Decide how to respond to online reputation attacks**

This flowchart embodies the rumor-response process used by the U.S. Air Force. Go to **http://real-timeupdates.com/bce7.** Under "Students," click on "Learn More."

**MOBILE APPS**

The Yelp mobile app is an easy way to keep the consumer review site at your fingertips—and to monitor what's being said about your business.

# Chapter Review and Activities

## Learning Objectives: Check Your Progress

**Objective 1: Apply the three-step writing process to negative messages.**

Because the way you say no can be even more damaging than the fact that you're saying it, planning negative messages is crucial. Make sure your purpose is specific and use an appropriate combination of medium and channel to fit the message. Collect all the facts necessary to support your negative decision, adapt your tone to the situation, and choose the optimum approach. Use positive words to construct diplomatic sentences, and pay close attention to quality.

**Objective 2: Explain how to use the direct approach effectively when conveying negative news.**

The direct approach puts the bad news up front, follows with the reasons, and closes with a respectful statement that shares any positive aspects that are relevant. Even though it is direct, however, don't use the direct approach as a license to be rude or overly blunt.

**Objective 3: Explain how to use the indirect approach effectively when conveying negative news, and explain how to avoid ethical problems when using this approach.**

The indirect approach begins with a buffer, explains the reasons, clearly states the negative news, and closes with a respectful statement. If the bad news is not unexpected, the direct approach is usually fine, but if the news is shocking or painful, the indirect approach is better. When using the indirect approach, pay careful attention to avoid obscuring the bad news, trivializing the audience's concerns, or even misleading your audience into thinking you're actually delivering good news. Remember that the purpose of the indirect approach is to cushion the blow, not to avoid delivering it.

**Objective 4: Describe successful strategies for sending negative messages on routine business matters.**

For making negative announcements on routine business matters, the indirect approach is usually preferred, unless the news has minor consequences for the audience. For rejecting suggestions or proposals when you requested input or it came from someone with whom you have an established relationship, the indirect approach is the right choice because it allows you to gently reset the other party's expectations.

For refusing routine requests, the direct approach is usually sufficient, except when the matter at hand is significant, you or your company have an established relationship with the person making the request, or you're forced to decline a request that you might have accepted in the past.

When conveying bad news about transactions, you need to modify the customer's expectations, explain how you plan to resolve the situation, and repair whatever damage might have been done to the business relationship. Whether or not you should apologize depends in part on the magnitude of the situation and whether you previously established specific expectations about the transaction.

When refusing a claim or a request for adjustment, the indirect approach is usually preferred because the other party is emotionally involved and expects you to respond positively. Demonstrate that you understand and have considered the complaint carefully, and then rationally and calmly explain why you are refusing the request.

**Objective 5: Describe successful strategies for sending negative employment-related messages.**

The indirect approach is usually the better choice for negative employment messages because the recipient is always emotionally involved and the decisions are usually significant. When refusing requests from other employers for performance-related information about past employees, your message can be brief and direct. Simply provide whatever information your company allows to be shared in these situations. Refusing a recommendation request directly from a former employee feels much more personal for the recipient, however, so the indirect approach is better.

You have some flexibility when responding to requests for recommendations or endorsements on social networks. You can choose to ignore the request if you don't know the person, you can decline the request as a matter of personal policy, you can write a full recommendation if that matches your assessment of the person, or you can write a limited recommendation on just one or a few aspects of the person's capabilities.

Messages rejecting job applicants raise a number of emotional and legal issues and therefore must be approached with great care. Experts vary in their advice about how much information to include in these messages. However, the safest strategy is a brief message that opens with an expression of appreciation for being considered (which functions like a buffer in an indirect message), continues with a statement to the effect that the applicant was not chosen for the position applied for, and closes courteously without providing reasons for the rejection or making promises about future consideration.

Negative performance reviews should take care to document the performance problems, make sure that all employees are being evaluated consistently, be written in a calm and objective voice, and focus on opportunities for improvement. Moreover, they must be written with reference to accurate, current job descriptions that provide the basis for measuring employee performance.

Termination messages are the most challenging employment messages of all. They should clearly present the reasons for the decision, present the reasons in a way that cannot be construed as unfair or discriminatory, follow company policy and any relevant legal guidelines, and avoid personal attacks or insults of any kind. Asking a manager not directly involved in the situation to review your message can help you avoid troublesome wording or faulty reasoning. Finally, try to deliver the written message in person if possible.

**Objective 6: List the important points to consider when conveying negative organizational news.**

When communicating negative organizational news, (1) match your approach to the situation, (2) consider the unique needs of each group, (3) minimize the element of surprise whenever possible so that affected groups have time to prepare and respond, (4) give yourself as much time as possible to plan and manage a response, (5) look for positive angles but don't exude false optimism, (6) seek expert advice, (7) use multiple channels to reach out to affected audiences, and (8) be open and transparent.

**Objective 7: Describe an effective strategy for responding to negative information in a social media environment.**

First, be sure you are engaged with important stakeholders before negative situations appear. Second, monitor the conversations taking place about your company and its products. Third, when you see negative messages, evaluate them before responding. Fourth, after evaluating negative messages, take the appropriate response based on an overall public relations plan. Some messages are better ignored, whereas others should be addressed immediately with corrective information.

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## Test Your Knowledge

To review chapter content related to each question, refer to the indicated Learning Objective.

**8-1.** What are the five general goals in delivering bad news? [LO-1]

✪ **8-2.** What questions should you ask yourself when choosing between the direct and indirect approaches? [LO-1]

**8-3.** What is the sequence of elements in a negative message organized using the direct approach? [LO-2]

**8-4.** What is a buffer, and what is the advantage of using a respectful, ethical buffer? [LO-3]

✪ **8-5.** Why is it important to be engaged with stakeholders before trying to use social media during a crisis or other negative scenario? [LO-7]

## Apply Your Knowledge

To review chapter content related to each question, refer to the indicated Learning Objective.

✪ **8-6.** Can you express sympathy with someone's negative situation without apologizing for the circumstances? Explain your answer. [LO-2]

✪ **8-7.** What guidelines would you follow to ensure that a close in an indirect approach conveys respect for your audience? [LO-3]

**8-8.** If your social media monitoring efforts pick up a tweet that accuses your customer service staff of lying and claims to have evidence to back it up, how would you respond? [LO-7]

# Practice Your Skills

## Exercises for Perfecting Your Writing

To review chapter content related to each set of exercises, refer to the indicated Learning Objective.

**Message Strategies: Writing Negative Messages [LO-2] [LO-3]** Select which approach you would use (direct or indirect) for the following negative messages.

**8-9.** An email message to an editor about a recent media report on your company that is defamatory both in its language and content

**8-10.** A communiqué to your shareholders informing them that there will not be any dividend payout for the year due to low profit margins

**8-11.** A note to your sports team informing them that, due to your sponsors backing out and a lack of financial resources, they will not be able to participate in the soccer league tournament next month

**Message Strategies: Writing Negative Messages [LO-3]** Answer the following questions pertaining to buffers.

**8-12.** You have to tell a local restaurant owner that your plans have changed and you are canceling the 90-person banquet scheduled for next month. Do you need to use a buffer? Why or why not?

**8-13.** Write a buffer for a letter declining an invitation to speak at an industry association's annual fund-raising event. Show your appreciation for being asked.

**8-14.** Write a buffer for a text message to your client who has rejected your media campaign due to the high costs involved and intends to explore other agencies.

**Message Strategies: Refusing Routine Requests; Collaboration: Team Projects [LO-4], Chapter 2** Working alone, revise the following statements to deemphasize the bad news without hiding it or distorting it. (*Hint*: Minimize the space devoted to the bad news, subordinate it, embed it, or use the passive voice.) Then team up with a classmate and read each other's revisions. Did you both use the same approach in every case? Which approach seems to be most effective for each of the revised statements?

**8-15.** The airline can't refund your money. The "Conditions" section on the back of your ticket states that there are no refunds for missed flights. Sometimes the airline makes exceptions, but only when life and death are involved. Of course, your ticket is still valid and can be used on a flight to the same destination.

**8-16.** I'm sorry to tell you, we can't supply the custom decorations you requested. We called every supplier, and none of them can do what you want on such short notice. You can, however, get a standard decorative package on the same theme in time. I found a supplier that stocks these. Of course, it won't have quite the flair you originally requested.

**8-17.** The snack maker you purchased six years ago is obsolete technology. We do not seem to have relevant replacement parts in our inventory. You may check with the dealer from whom you purchased it.

## Activities

Each activity is labeled according to the primary skill or skills you will need to use. To review relevant chapter content, you can refer to the indicated Learning Objective. In some instances, supporting information will be found in another chapter, as indicated.

**8-18. Message Strategies: Making Negative Announcements [LO-4]** Read the following document and (a) analyze the strengths and weaknesses of each sentence and (b) revise the document so that it follows this chapter's guidelines.

In view of the substantial increase in corporate expenditure that has severely impacted our bottom line, our finance controller has decided to introduce some cost-cutting measures with effect from the first of next month.

The free corporate lunch will no longer be available, but employees can purchase their meals at a subsidized rate. Further, the cafeteria will be open only between 1 p.m. and 2:30 p.m. for lunch and no late-comers will be entertained. The cooling system in the office will be turned off during lunch hours. Tea and coffee will be available at the vending machine installed on each floor.

It has been observed that there is indiscriminate waste of stationary and hence each department will now be required to maintain a log of all items requisitioned. Unnecessary photocopying will not be permitted.

The company plans to discontinue free transportation to and from the office, but team members can share a taxi ride among themselves.

These changes are imperative and are subject to revision no sooner than improvement of our profit margins. We hope that all of you will cooperate and work cohesively to reduce unwarranted expenses and thereby ensure a healthy financial environment for you and other stakeholders. Should anyone have any reservations about these measures, please write in and let me know.

**8-19. Message Strategies: Refusing Routine Requests [LO-4]** As a customer service supervisor for a mobile phone company, you're in charge of responding to customers' requests for refunds. You've just received an email from a customer who unwittingly ran up a $550 bill for data charges after forgetting to disable his smartphone's WiFi hotspot feature. The customer says it wasn't his fault because he didn't know his roommates were using his phone to get free Internet access. However, you've dealt with this situation before and provided a notice to all customers to be careful about excess data charges resulting from the use of the hotspot capability. Draft a short buffer (one or two sentences) for your email reply, sympathizing with the customer's plight but preparing him for the bad news (that company policy specifically prohibits refunds in such cases).

**8-20. Message Strategies: Refusing Routine Requests [LO-4]** Read the following document and (a) analyze the strengths and weaknesses of each sentence and (b) revise the message so that it follows this chapter's guidelines.

I am writing in connection with your request for our sponsorship of the event scheduled for December this year. Your proposal has reached us rather late, and seems to be a last-minute pitch to gain our favor. However, our promotional budgets are decided well in advance of the year, which renders it impossible for us to review and accept late proposals.

Having made a cursory review of your proposal, we note that your team has failed to establish business synergies while communicating this request to us. Our product portfolio is rather diverse and so are our target audiences, which would render our participation in this event a total mismatch for our brands. This apart, one of our competitors is also an auxiliary sponsor, which again points to the fact that you guys have not done your homework. While I have to turn down your request for sponsorship, I wish your event and your team great success in your search for the right title sponsor.

**8-21. Message Strategies: Making Negative Announcements; Communication Ethics: Distinguishing Ethical Dilemmas and Ethical Lapses [LO-4], Chapter 1** The insurance company where you work is planning to raise all premiums for health-care coverage. Your boss has asked you to read a draft of her letter to customers, announcing the new, higher rates. The first two paragraphs discuss some exciting medical advances and the expanded coverage offered by your company. Only in the final paragraph do customers learn that they will have to pay more for coverage starting next year. What are the ethical implications of this draft? What changes would you suggest?

**8-22. Message Strategies: Making Negative Announcements [LO-4]** Read the following letter sent to customers informing them of an inordinate delay in the delivery of their limited edition convertibles due to a shortage of parts and a lock-out at one of the company's main facilities. Using what you've learned in the chapter, read the message carefully and analyze its faults. Then revise the message with a stronger "you" attitude, a suitable buffer, and a reassuring close.

FROM: Lionel Martin, COO, MotoSpark
SUBJECT: Inordinate delay in the delivery of Limited Edition vehicle.

Dear Esteemed Patrons,

We regret to inform you that the delivery of the premium Limited Edition vehicle booked by you, which was scheduled for delivery by Christmas this year, has been delayed. There has been an unforeseen delay in the availability of crankshafts and pistons from our vendor, which has thrown our production line out of gear, resulting in tremendous losses to our company. This is coupled with the sudden shutdown at one of our main facilities, which has also contributed to the delay. These were rather unfortunate and have caused great embarrassment to the company. We hope to resolve the current impasse soon and ensure that there are no further delays in the delivery of these vehicles. We apologize for the delay and will intimate all our patrons as soon as our production systems are set in motion.

I thank you all for choosing this Limited Edition of MotoSpark and assure you of our best service in the future.

Sincerely,
Lionel Martin

**8-23. Message Strategies: Refusing Routine Requests; Collaboration: Team Projects [LO-4], Chapter 2** The following letter rejecting a faucet manufacturer's product presentation contains many errors in judgment. Working with your classmates in a team effort, you should be able to improve its effectiveness as a negative message. First, analyze and discuss the letter's flaws. Then rewrite it using the indirect approach.

July 15, 2015

Pamela Wilson, Operations Manager Sterling Manufacturing 133 Industrial Avenue Gary, IN 46403

Dear Ms. Wilson:

We regret to inform you that your presentation at Home Depot's recent product review sessions in St. Petersburg did not meet our expert panelists' expectations. We require new products that will satisfy our customers' high standards. Yours did not match this goal.

Our primary concern is to continue our commitment to product excellence, customer knowledge, and price competitiveness, which has helped make Home Depot a Fortune 500 company with more than a thousand stores nationwide. The panel found flaws in your design and materials. Also, your cost per unit was too high.

The product review sessions occur annually. You are allowed to try again; just apply as you did this year. Again, I'm sorry things didn't work out for you this time.

Sincerely,
Hilary Buchman, Assistant to the Vice President, Sales

**8-24. Message Strategies: Negative Employment Messages [LO-5]** Read the following document and (a) analyze the strengths and weaknesses of each sentence and (b) revise the message so that it follows this chapter's guidelines.

I regret to inform you that you were not selected for our summer intern program at Equifax. We had over a thousand résumés and cover letters to go through and simply could not get to them all. We have been asked to notify everyone that we have already selected students for the 25 positions based on those who applied early and were qualified.

We're sure you will be able to find a suitable position for summer work in your field and wish you the best of luck. We deeply regret any inconvenience associated with our reply.

## Expand Your Skills

### Critique the Professionals

Locate an example online of a negative-news message from any company. Possible examples include announcements of product recalls, poor financial results, layoffs, and fines or other legal troubles. Analyze the approach the company took; was it the most effective strategy possible? Did the company apologize, if doing so would have been appropriate under the circumstances, and does the apology seem sincere? Does the tone of the message match the seriousness of the situation? Does the message end on a positive note, as appropriate? Using whatever medium your instructor requests, write a brief analysis of the message (no more than one page), citing specific elements from the piece and support from the chapter.

### Sharpen Your Career Skills Online

Bovée and Thill's Business Communication Web Search, at **http://websearch.businesscommunicationnetwork.com**, is a unique research tool designed specifically for business communication research. Use the Web Search function to find a website, video, PDF document, podcast, or presentation that offers advice on conveying negative news in business messages. Write a brief email message to your instructor or a post for your class blog describing the item that you found and summarizing the career skills information you learned from it.

# Cases

Website links for selected companies mentioned in cases can be found in the Student Assignments section at **http://real-timeupdates.com/bce7**.

### Negative Messages on Routine Business Matters

#### EMAIL SKILLS

**8-25. Message Strategies: Refusing Claims and Requests for Adjustment [LO-4]** Your company markets a line of rugged smartphone cases designed to protect the sensitive devices from drops, spills, and other common accidents. Your guarantee states that you will reimburse customers for the cost of a new phone if the case fails to protect it from any of the following: (1) a drop of no more than 6 feet onto any surface, (2) spills of any beverage or common household chemical, (3) being crushed by any object of up to 100 pounds, or (4) being chewed on by dogs, cats, or other common household pets.

Jack Simmons, a rancher from Wyoming, emailed your customer support staff, requesting a reimbursement after he dropped his iPhone in his hog barn and a 900-pound boar crushed it in a single bite.

**Your task:** Write an email response to the customer, denying his request for a new phone.

**8-26. Message Strategies: Rejecting Suggestions and Proposals; Communication Ethics: Making Ethical Choices [LO-5]** Knowing how much online product reviews can shape consumer behavior, the other cofounder of your company has just circulated an internal email message with the not-so-subtle hint that everyone in your small startup should pose as happy customers and post glowing reviews of your new product on Amazon and other shopping sites. You're horrified at the idea—not only is this highly unethical, but if (or more likely when) the scheme is exposed, the company's reputation will be severely damaged.

**Your task:** You would prefer to address this in a private conversation, but since your partner has already pitched the idea to everyone via email, you have no choice but to respond via email as well. You need to act quickly before anyone acts on the suggestion. Write a response, explaining why this is a bad idea and telling employees not to do it. Keep in mind that you are chastising your business partner in front of all your employees. Make up any names or other details you need.

#### MICROBLOGGING SKILLS

**8-27. Message Strategies: Making Routine Negative Announcements [LO-5]** Professional musicians do everything they can to keep the show going, particularly for tours that are scheduled months in advance. However, illness and other unforeseeable circumstances can force an act to cancel shows, even after all the tickets have been sold.

**Your task:** Choose one of you favorite musical acts and assume that you are the tour manager who needs to tell 25,000 fans that an upcoming concert must be canceled because of illness. Ticket holders can apply for a refund at the artist's website or keep their tickets for a future concert date, which will be identified and announced as soon as possible. Write two tweets, one announcing the cancellation and one outlining the options for ticket holders. Make up any information you need, and send your tweets to your instructor via email (don't actually tweet them!).

#### EMAIL SKILLS

**8-28. Message Strategies: Rejecting Suggestions and Proposals [LO-4]** Walter Joss is one the best employees in your department, a smart and hard worker with a keen mind for business. His upbeat attitude has helped the entire department get through some rough times recently, and on a personal level, his wise counsel helped you grow into a leadership role when you were promoted to marketing manager several years ago.

You generally welcome Joss's input on the department's operations, and you have implemented several of his ideas to improve the company's marketing efforts. However, the proposal he emailed you yesterday was not his best work, to put it mildly. He proposed that the company dump the advertising agency it has used for a decade and replace it with some new agency you've never heard of. The only reasons he offered were that the agency "had become unresponsive" and that a "smaller agency could meet our needs better." He failed to address any of the other criteria that are used to select advertising agencies, such as costs, creative skills, technical abilities, geographic reach, research capabilities, and media experience.

This is the first you've heard any criticism of the agency, and in fact, their work has helped your company increase sales every year.

**Your task:** Draft an email message to Joss, rejecting his proposal. (Note that in a real-life setting, you would want to discuss this with Joss in person, rather than through email, but use email for the purposes of this exercise.)

#### EMAIL SKILLS

**8-29. Message Strategies: Making Routine Negative Announcements [LO-4]** You've been proud of many things your gardening tool company has accomplished as it grew from just you working in your basement shop to a nationally known company that employs more than 200 people. However, nothing made you prouder than the company's Helping Our Hometown Grow program, in which employees volunteer on company time to help residents in your city start their own vegetable gardens, using tools donated by the company. Nearly 50 employees participated directly, helping some 500 families supplement their grocery budgets with home-grown produce. Virtually everyone in the company contributed, though, because employees who didn't volunteer to help in the gardens pitched in to cover the work responsibilities of the volunteers.

Sadly, 10 years after you launched the program, you have reached the inescapable conclusion that the company can no longer afford to keep the program going. With consumers around the country still struggling with the aftereffects of a deep recession, sales have been dropping for the past 3 years—even as lower-cost competitors step up their presence in the market. To save the program, you would have to lay off several employees, but your employees come first.

**Your task:** Write an email to the entire company, announcing the cancelation of the program.

## LETTER WRITING SKILLS

**8-30. Message Strategies: Making Negative Announcements [LO-4]** Your company, PolicyPlan Insurance Services, is a 120-employee insurance claims processor based in Milwaukee. PolicyPlan has engaged Midwest Sparkleen for interior and exterior cleaning for the past five years. Midwest Sparkleen did exemplary work for the first four years, but after a change of ownership last year, the level of service has plummeted. Offices are no longer cleaned thoroughly, you've had to call the company at least six times to remind them to take care of spills and other messes they're supposed to address routinely, and they've left toxic cleaning chemicals in a public hallway on several occasions. You have spoken with the owner about your concerns twice in the past three months, but his assurances that service would improve have not resulted in any noticeable improvements. When the evening cleaning crew forgot to lock the lobby door last Thursday—leaving your entire facility vulnerable to theft from midnight until 8 a.m. Friday morning—you decided it was time for a change.

**Your task:** Write a letter to Jason Allred, owner of Midwest Sparkleen, 4000 South Howell Avenue, Milwaukee, WI 53207, telling him that PolicyPlan will not be renewing its annual cleaning contract with Midwest Sparkleen when the current contract expires at the end of this month. Cite the examples identified previously, and keep the tone of your letter professional.

## PODCASTING SKILLS

**8-31. Message Strategies: Making Negative Announcements [LO-4]** Offering an employee concierge seemed like a great idea when you added it as an employee benefit last year. The concierge handles a wide variety of personal chores for employees—everything from dropping off their dry cleaning to ordering event tickets to sending flowers. Employees love the service, and you know the time they save can be devoted to work or family activities. Unfortunately, profits are way down, and concierge use is up—up so far that you'll need to add a second concierge to keep up with the demand. As painful as it will be for everyone, you decide that the company needs to stop offering the service.

**Your task:** Script a brief podcast announcing the decision and explaining why it was necessary. Make up any details you need. If your instructor asks you to do so, record your podcast and submit the file.

## MICROBLOGGING SKILLS

**8-32. Message Strategies: Making Negative Announcements on Routine Business Matters [LO-4]** JetBlue was one of the first companies to incorporate the Twitter microblogging service into its customer communications, and more than a million flyers and fans now follow the airline's tweeting staff members. Messages include announcements about fare sales (such as limited-time auctions on eBay or special on-site sales at shopping malls), celebrations of company milestones (such as the opening of the carrier's new terminal at New York's JFK airport), schedule updates, and personalized responses to people who tweet questions or complaints.[23]

**Your task:** Write a tweetable message alerting JetBlue customers to the possibility that Hurricane Isaac might disrupt flight schedules from August 13 through August 15. Tell them that decisions about delays and cancelations will be made on a city-by-city basis and will be announced on Twitter and the company's website. The URL will take 20 characters, so you have 120 characters (including spaces) for your message. Email the text of your tweet to your instructor.

## EMAIL SKILLS

**8-33. Message Strategies: Refusing Routine Requests [LO-4]** Lee Valley Tools sells high-quality woodworking tools across Canada through its retail stores and around the world through its website and catalogs. Although weekend hobbyists can pick up a mass-produced hand plane (a tool for smoothing wood) for $20 or $30 at the local hardware store, serious woodworkers pay 5 or 10 times that much for one of Lee Valley's precision Veritas planes. For the price, they get top-quality materials, precision manufacturing, and innovative designs that help them do better work in less time.

Lee Valley sells its own Veritas-brand tools and 5,000 tools made by other manufacturers. One of those companies has just emailed you to ask if Lee Valley would like to carry a new line of midrange hand planes that would cost more than the mass-market, hardware-store models but less than Lee Valley's own Veritas models. Your job is to filter requests such as this, rejecting those that don't meet Lee Valley's criteria and forwarding those that do to the product selection committee for further analysis. After one quick read of this incoming email message, you realize there is no need to send this idea to the committee. Although these planes are certainly of decent quality, they achieve their lower cost through lower-quality steel that won't hold an edge as long and through thinner irons (the element that holds the cutting edge) that will be more prone to vibrate during use and thus produce a rougher finish. These planes have a market, to be sure, but they're not a good fit for Lee Valley's top-of-the-line product portfolio. Moreover, the planes don't offer any innovations in terms of ease of use or any other product attribute.[24]

**Your task:** Reply to this email message, explaining that the planes appear to be decent tools, but they don't fit Lee Valley's strategy of offering only the best and most innovative tools. Support your decision with the three criteria described previously. Choose the direct or indirect approach carefully, taking into consideration your company's relationship with this other company.

### Negative Employment Messages

#### MEMO WRITING SKILLS/ PORTFOLIO BUILDER

**8-34. Message Strategies: Negative Employment Messages [LO-5]** Elaine Bridgewater, the former professional golfer you hired to oversee your golf equipment company's relationship with retailers, knows the business inside and out. As a former touring pro, she has unmatched credibility. She also has seemingly boundless energy, solid technical knowledge, and an engaging personal style. Unfortunately, she hasn't been quite as attentive as she needs to be when it comes to communicating with retailers. You've been getting complaints about voice-mail messages gone unanswered for days, confusing emails that require two or three rounds of clarification, and reports that are haphazardly thrown together. As valuable as Bridgewater's other skills are, she's going to cost the company sales if this goes on much longer. The retail channel is vital to your company's survival, and she's the employee most involved in the channel.

**Your task:** Draft a brief (one page maximum, in memo format) informal performance appraisal and improvement plan for Bridgewater. Be sure to compliment her on the areas in which she excels, but don't shy away from highlighting the areas in which she needs to improve, too: punctual response to customer messages; clear writing; and careful revision, production, and proofreading. Use what you've learned in this course so far to supply any additional advice about the importance of these skills.

#### SOCIAL NETWORKING SKILLS/ EMAIL SKILLS

**8-35. Message Strategies: Refusing Requests for Recommendations [LO-5]** You're delighted to get a message from an old friend and colleague, Heather Lang. You're delighted right up to the moment you read her request that you write a recommendation about her web design and programming skills for your LinkedIn profile. You would do just about anything for Lang—anything except recommend her web design skills. She is a master programmer whose technical wizardry saved many client projects, but when it comes to artistic design, Lang simply doesn't have "it." From gaudy color schemes to unreadable type treatment to confusing layouts, her design sense is as weak as her technical acumen is strong.

**Your task:** First, write a brief email to Lang, explaining that you would be most comfortable highlighting her technical skills because that is where you believe her true strengths lie. Second, write a two-sentence recommendation that you could include in your LinkedIn profile, recommending Lang's technical skills. Make up or research any details you need.

#### EMAIL SKILLS

**8-36. Message Strategies: Refusing Requests for Recommendations [LO-5]** Well, this is awkward. Daniel Sturgis, who quit last year just as you were planning to fire him for consistently failing to meet agreed-upon performance targets, has just emailed you from his new job, asking for a recommendation. He says his new job is awful and he regrets leaving your company. He knows you don't have any openings, but he would be grateful for a recommendation.

**Your task:** Write an email message to Sturgis, explaining that you will not be able to write him a recommendation. Make up any details you need.

### Negative Organizational News

#### SOCIAL NETWORKING SKILLS

**8-37. Message Strategies: Negative Organizational Messages [LO-6]** XtremityPlus is known for its outlandish extreme-sports products, and the Looney Launch is no exception. Fulfilling the dream of every childhood daredevil, the Looney Launch is an aluminum and fiberglass contraption that quickly unfolds to create the ultimate bicycle jump. The product has been selling as fast as you can make it, even though it comes plastered with warning labels proclaiming that its use is inherently dangerous.

As XtremityPlus's CEO, you were nervous about introducing this product, and your fears were just confirmed: You've been notified of the first lawsuit by a parent whose child broke several bones after crash-landing off a Looney Launch.

**Your task:** Write a post for your internal blog, explaining that the Looney Launch is being removed from the market immediately. Tell your employees to expect some negative reactions from enthusiastic customers and retailers, but explain that (a) the company can't afford the risk of additional lawsuits and (b) even for XtremityPlus, the Looney Launch pushes the envelope a bit too far. The product is simply too dangerous to sell in good conscience.

### Messages in Response to Social Media Rumors

#### MICROBLOGGING SKILLS

**8-38. Message Strategies: Responding to Rumors [LO-7]** Sheila Elliot, a well-known actress, appeared on a national talk show last night and claimed your company's Smoothstone cookware was responsible for her toddler's learning disability. Elliot said the nonstick surfaces of Smoothstone pots and pans contain a dangerous chemical that affected her child's cognitive development. There's just one problem with her story—well, three problems, actually: (1) Your company's cookware line is called Moonstone, not Smoothstone; (2) Moonstone does not contain and never has contained the chemical Elliot mentioned, and (3) the product she is really thinking of was called Smoothfire, which was made by another company and was pulled off the market five years ago.

Thousands of worried parents aren't waiting for the fact checkers, however. They took to the blogosphere and Twittersphere with a vengeance overnight, warning people to throw away anything made by your company (Tatum Housewares). Several television stations have already picked up the Twitter chatter and repeated the rumor. Retailers are already calling your sales staff to cancel orders.

**Your task:** Write a three-message sequence to be posted on your company's Twitter account, correcting the rumor and conveying the three points outlined above. Each message will include a URL linking to your company's website, so restrict each message to 120 characters, including spaces.

### SOCIAL NETWORKING SKILLS/ MOBILE SKILLS

**8-39. Message Strategies: Responding to Rumors and Public Criticism [LO-7]** The consumer reviews on Yelp can be a promotional boon to any local business—provided the reviews are positive, of course. Negative reviews, fair or not, can affect a company's reputation and drive away potential customers. Fortunately for business owners, sites like Yelp give them the means to respond to reviews, whether they want to apologize for poor service, offer some form of compensation, or correct misinformation in a review.

**Your task:** Search Yelp for a negative review (one or two stars) on any business in any city. Find a review that has some substance to it, not just a simple, angry rant. Now imagine that you are the owner of that business, and write a reply that could be posted via the "Add Owner Comment" feature. Use information you can find on Yelp about the company, and fill in any details by using your imagination. Remember that your comment will be visible to everyone who visits Yelp. People searching for restaurant reviews often do so on mobile devices, so make sure your message will be easily readable on smartphone screens.

## Improve Your Grammar, Mechanics, and Usage

You can download the text of this assignment from http://real-timeupdates.com/bce7; click on Student Assignments and then click on Chapter 8. Improve Your Grammar, Mechanics, and Usage.

### Level 1: Self-Assessment—Semicolons, Colons, and Commas

Review Sections 2.4, 2.5, and 2.6 in the Handbook of Grammar, Mechanics, and Usage, and then complete the following 15 items.

For the following items, insert all required semicolons, colons, and commas.

**8-40.** This letter looks good that one doesn't.
**8-41.** I want to make one thing perfectly clear neither of you will be promoted if sales figures don't improve.
**8-42.** The Zurich airport has been snowed in therefore I won't be able to meet with you before January 4.
**8-43.** His motivation was obvious to get Meg fired.
**8-44.** Only two firms have responded to our survey J. J. Perkins and Tucker & Tucker.
**8-45.** Send a copy to Mary Kent Marketing Director Robert Bache Comptroller and Dennis Mann Sales Director.
**8-46.** Please be sure to interview these employees next week Henry Gold Doris Hatch and George Iosupovich.
**8-47.** We have observed your hard work because of it we are promoting you to manager of your department.
**8-48.** You shipped three items on June 7 however we received only one of them.
**8-49.** The convention kit includes the following response cards, giveaways, brochures, and a display rack.
**8-50.** The workers wanted an immediate wage increase they had not had a raise in nearly two years.
**8-51.** This then is our goal for 2013 to increase sales 35 percent.
**8-52.** His writing skills are excellent however he still needs to polish his management style.
**8-53.** We would like to address three issues efficiency profitability and market penetration.
**8-54.** Remember this rule When in doubt leave it out.

### Level 2: Workplace Applications

The following items may contain errors in grammar, capitalization, punctuation, abbreviation, number style, word division, and vocabulary. Rewrite each sentence, correcting all errors. If a sentence has no errors, write "Correct" for that number.

**8-55.** Hector's, Julie's, and Tim's report was well-received by the Committee.
**8-56.** Everyone who are interested in signing up for the training seminar must do so by 3:00 o'clock pm on friday.
**8-57.** David Stern is a management and training expert that has spent a major part of his career coaching, counseling, and giving advise both to managers and workers.
**8-58.** Be aware and comply with local "zoning ordnances" and building codes.
**8-59.** Garrett didn't seem phased when her supervisor didn't except her excuse for being late, she forgot to set her alarm.
**8-60.** Copyright laws on the Internet is not always clearly defined, be sure your research doesn't extend to "borrowing" a competitors' keywords or copy.
**8-61.** Sauder Woodworking, in Archibald, Ohio sell a line of ready to assemble computer carts, desks, file cabinets, and furniture that is modular that can be mixed and matched to meet each business owners' personal taste.
**8-62.** Spamming is the most certain way to loose you're email account, Web site, and you're reputation.
**8-63.** Us programmers have always tried to help others learn the tricks of the trade, especially Roger and myself.
**8-64.** The person whom was handling Miss Martinez' account told her that an error had been made by the bank in her favor.
**8-65.** "The trouble with focus groups" says Marketing Expert Frances Knight, "Is that consumers rarely act in real life they way they do in a "laboratory" setting."
**8-66.** In a industry in which design firms tend to come and go Skyline has licensed seventy products and grown to 8 employees.
**8-67.** If youve ever wondered why fast food restaurants are on the left and gift shops are on the right as you walk toward the gate into a newly-constructed airport you should read Malcolm Gladwells article, 'The Science of Shopping,' in the New Yorker.

**8-68.** Anyone whose starting a business should consider using their life story, as a way to generate customer's interest.

**8-69.** Having been in business since 1993, over 1000s of sales calls has been made by Mr. Jurzang, on prospects for his minority owned company.

### Level 3: Document Critique

The following document may contain errors in grammar, capitalization, punctuation, abbreviation, number style, word division, and vocabulary. As your instructor indicates, photocopy this page and correct all errors using standard proofreading marks (see Appendix C), or download the document and make the corrections in your word-processing software.

TO: all.employees

SUBJECT: Health insurance—Changes

Unlike many companies, Bright Manufacturing has always paid a hundred % of medical car insurance for it's employees, absorbing the recent 10–20 percent annual cost increases in order to provide this important benefit. This year; Blue Cross gave us some terrible news: the cost increase for our employee's medical coverage would be a staggering fourty percent per month next year

To mange the increase and continue to offer you and your family highquality medical coverage we have negotiated several changes with Blue Cross; a new cost saving alternative is also being offered by us:

Under the Blue Cross Plus plan, copay amounts for office visits will be ten dollars next year/ $50 for emergency room visits. 80 % of employees' insurance coverage (including 10 percent of the cost increase) will be paid by Bright next year and 100 % of the prescription drug costs (including a 23 percent cost increase). The remaining twenty percent of medical coverage will be deducted by us monthly from your salary, if you choose to remain on a Blue Cross Plus plan. We realize this is alot, but its still less than many companies charge their employees.

A fully paid alternative health plan, Blue Cross HMO, will now be provided by Bright at no cost to employees. But be warned that there is a deadline. If you want to switch to this new plan you must do so during our open enrollment period, Nov. 20 to December 1, and we will not consder applications for the change after that time so don't get your forms in late.

There are forms available in the Human Resources office for changing your coverage. They must be returned between November 20 and December 1. If you wish to remain on a Blue Cross Plus policy, you do not need to notify us; payroll deductions for company employees on the plan will occur automatic beginning January first.

If you have questions, please call our new Medical Benefits Information line at ext. 3392. Our Intranet sight will also provide you easy with information about health care coverage online if you click the "Medical Benefits" icon. Since our founding in 1946, we have provided our company employees with the best medical coverage available. We all hate rising costs and although things are looking bleak for the future but we're doing all we can do to hold on to this helpful benefit for you.

Lucinda Goodman, Benefits Mangr., Human resources

MyBCommLab

Go to **mybcommlab.com** for the following Assisted-graded writing questions:

**8-70.** Would you choose the direct or indirect approach to announce that a popular employee benefit is being eliminated for cost reasons? Why? [LO-1]

**8-71.** How would you respond to a LinkedIn network connection who asks for a recommendation when you barely remember working with this person and don't remember whether she was good at her job? [LO-5]

## Endnotes

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# 9 Writing Persuasive Messages

## LEARNING OBJECTIVES

After studying this chapter, you will be able to

1. Apply the three-step writing process to persuasive messages
2. Describe an effective strategy for developing persuasive business messages
3. Identify the three most common categories of persuasive business messages
4. Describe an effective strategy for developing marketing and sales messages, explain how to modify this approach for social media, and identify steps you can take to avoid ethical lapses in marketing and sales messages



## Communication Matters . . .

"Trustworthiness, transparency, credible authority, lots of high-value content, and just plain old decency are your best weapons."
—Sonia Simone, cofounder and chief marketing officer of Copyblogger Media

Sonia Simone was discussing the fear that keeps online shoppers from completing a transaction, but her insight applies to every form of persuasive communication.[1] Trust is an essential element of persuasion, whether you're trying to convince people to help fund your new business via Kickstarter, asking your boss for a raise, or promoting a concert. If people don't believe in you, they won't believe in what you're promoting.

In this chapter, you'll apply what you've learned so far about writing to the unique challenges of persuasive messages. You'll explore two types of persuasive messages: *persuasive business messages* (those that try to convince audiences to approve new projects, enter into business partnerships, and so on) and *marketing and sales messages* (those that try to convince audiences to consider and then purchase products and services).

Sonia Simone/Copyblogger Media

Sonia Simone emphasizes the power of trust in persuasive communication; without it, you'll have a hard time convincing people to change their beliefs or behaviors.

# Using the Three-Step Writing Process for Persuasive Messages

1 LEARNING OBJECTIVE
Apply the three-step writing process to persuasive messages.

Persuasion is the attempt to change someone's attitudes, beliefs, or actions.

For both internal messages to colleagues, employees, and managers and for external messages to customers, investors, and other outsiders, you'll use many of the same techniques of **persuasion**—the attempt to change an audience's attitudes, beliefs, or actions.[2] Because persuasive messages ask audiences to give something of value (money in exchange for a product, for example) or take substantial action (such as changing a corporate policy), they are more challenging to write than routine messages. Successful professionals understand that persuasion is not about trickery or getting people to act against their own best interests; it's about letting audiences know they have choices and presenting your offering in the best possible light.[3]

## STEP 1: PLANNING PERSUASIVE MESSAGES

Having a great idea or a great product is not enough; you need to be able to convince others of its merits.

In today's information-saturated business environment, having a great idea or a great product is no longer enough. Every day, untold numbers of good ideas go unnoticed and good products go unsold simply because the messages meant to promote them aren't compelling enough to be heard above the competitive noise. Creating successful persuasive messages in these challenging situations demands careful attention to all four tasks in the planning step, starting with an insightful analysis of your purpose and your audience.

### Analyzing the Situation

Clarifying your purpose is an essential step with persuasive messages.

In defining your purpose, make sure you're clear about what you really hope to achieve. Suppose you want to persuade company executives to support a particular research project. But what does "support" mean? Do you want them to pat you on the back and wish you well? Or do you want them to give you a staff of five researchers and a $1 million annual budget?

The best persuasive messages are closely connected to your audience's desires and interests (see Figure 9.1).[4] Consider these important questions: Who is my audience? What are my audience members' needs? What do I want them to do? How might they resist? Are there alternative positions I need to examine? What does the decision maker consider to be the most important issue? How might the organization's culture influence my strategy?

Demographics include characteristics such as age, gender, occupation, income, and education.

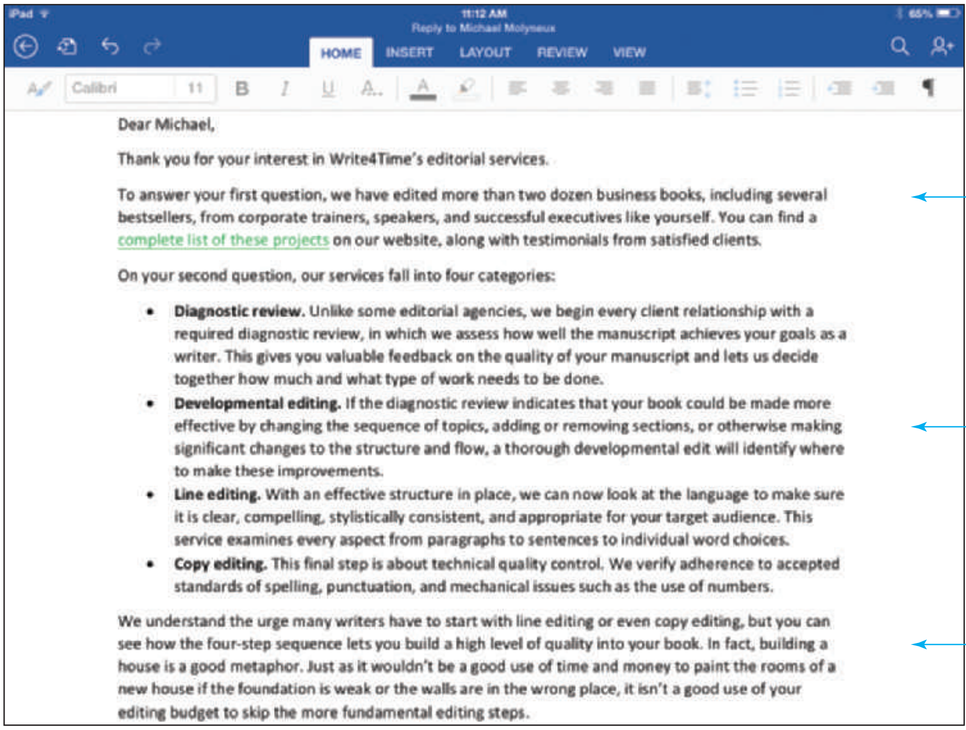
Psychographics include characteristics such as personality, attitudes, and lifestyle.

To understand and categorize audience needs, you can refer to specific information, such as **demographics** (the age, gender, occupation, income, education, and other quantifiable characteristics of the people you're trying to persuade) and **psychographics** (personality, attitudes, lifestyle, and other psychological characteristics). When analyzing your audiences, take into account their cultural expectations and practices so that you don't undermine your persuasive message by using an inappropriate appeal or by organizing your message in a way that seems unfamiliar or uncomfortable to your readers.

If you aim to change someone's attitudes, beliefs, or actions, it is vital to understand his or her **motivation**—the combination of forces that drive people to satisfy their needs. Table 9.1 on page 258 lists some of the needs that psychologists have identified or suggested as being important in influencing human motivation. Obviously, the more closely a persuasive message aligns with a recipient's existing motivation, the more effective the message is likely to be. For example, if you try to persuade consumers to purchase a product on the basis of its fashion appeal, that message will connect with consumers who are motivated by a desire to be in fashion, but it probably won't connect with consumers driven more by functional or financial concerns.

### Gathering Information

Once your situation analysis is complete, you need to gather the information necessary to create a compelling persuasive message. You'll learn more about the types of information to include in persuasive business messages and marketing and sales messages later in the chapter. Chapter 10 presents advice on how to find the information you need.




Dear Michael,

Thank you for your interest in Write4Time's editorial services.

To answer your first question, we have edited more than two dozen business books, including several bestsellers, from corporate trainers, speakers, and successful executives like yourself. You can find a complete list of these projects on our website, along with testimonials from satisfied clients.

On your second question, our services fall into four categories:

- **Diagnostic review.** Unlike some editorial agencies, we begin every client relationship with a required diagnostic review, in which we assess how well the manuscript achieves your goals as a writer. This gives you valuable feedback on the quality of your manuscript and lets us decide together how much and what type of work needs to be done.
- **Developmental editing.** If the diagnostic review indicates that your book could be made more effective by changing the sequence of topics, adding or removing sections, or otherwise making significant changes to the structure and flow, a thorough developmental edit will identify where to make these improvements.
- **Line editing.** With an effective structure in place, we can now look at the language to make sure it is clear, compelling, stylistically consistent, and appropriate for your target audience. This service examines every aspect from paragraphs to sentences to individual word choices.
- **Copy editing.** This final step is about technical quality control. We verify adherence to accepted standards of spelling, punctuation, and mechanical issues such as the use of numbers.

We understand the urge many writers have to start with line editing or even copy editing, but you can see how the four-step sequence lets you build a high level of quality into your book. In fact, building a house is a good metaphor. Just as it wouldn't be a good use of time and money to paint the rooms of a new house if the foundation is weak or the walls are in the wrong place, it isn't a good use of your editing budget to skip the more fundamental editing steps.

This paragraph succinctly answers the client's first question, which was whether the company had experience editing business books like the one he has written. By mentioning bestsellers, the message also addresses the client's emotional and financial needs to publish a successful book.

The message outlines the company's services but does so in a way that addresses the client's needs at every step.

This section addresses the frequent urge to jump right into the final stages of editing by explaining that doing so ultimately doesn't meet the client's true objectives. Note the effective use of metaphor here as well.

**Figure 9.1 Appealing to Audience Needs**
This draft of a response to an inquiry about an editorial company's services addresses the writer's concerns about the time, cost, and effectiveness of the company's services.
*Source:* Microsoft Office 2013.

## Selecting the Right Combination of Medium and Channel

Media and channel choices are always important, of course, but these decisions are particularly sensitive with persuasive messages because such messages are often unexpected or even unwelcome. For instance, some people don't mind promotional email messages for products they're interested in; others resent every piece of commercial email they receive. Persuasive messages can be found in virtually every communication medium, from instant messages and podcasts to radio advertisements and skywriting. In fact, advertising agencies employ media specialists whose only job is to analyze the media options available and select the most cost-effective combination for each client and each advertising campaign.

Persuasive messages are often unexpected and sometimes even unwelcome, so choose your medium carefully to maximize the chance of getting through to your audience.

## Organizing Your Information

The nature of persuasion is to convince people to change their attitudes, beliefs, or actions, so most persuasive messages use the indirect approach. That means you'll want to explain your reasons and build interest before asking for a decision or for action—or perhaps even before revealing your purpose. However, in some instances, such as when you have a close relationship with your audience and the message is welcome or at least neutral, the direct approach can be effective.

Most persuasive messages use the indirect approach.

For persuasive business messages, the choice between the direct and indirect approaches is also influenced by the extent of your authority, expertise, or power in an organization. For example, if you are a highly regarded technical expert with years of experience, you might use the direct approach in a message to top executives. In contrast, if you aren't well known and therefore need to rely more on the strength of your message than the power of your reputation, the indirect approach will probably be more successful.

The choice of approach is influenced by your position (or authority within the organization) relative to your audience's.

# STEP 2: WRITING PERSUASIVE MESSAGES

Encourage a positive response to your persuasive messages by (1) using positive and polite language, (2) understanding and respecting cultural differences, (3) being sensitive to organizational cultures, and (4) taking steps to establish your credibility.

Persuasive messages are often unexpected or even unwelcome, so the "you" attitude is crucial.

TABLE 9.1 **Human Needs That Influence Motivation**

| Need | Implications for Communication |
|---|---|
| **Basic physiological requirements:** The needs for food, water, sleep, oxygen, and other essentials | Everyone has these needs, but the degree of attention an individual gives to them often depends on whether the needs are being met; for instance, an advertisement for sleeping pills will have greater appeal to someone suffering from insomnia than to someone who has no problem sleeping. |
| **Safety and security:** The needs for protection from bodily harm, for the safety of loved ones, and for financial security, protection of personal identity, career security, and other assurances | These needs influence both consumer and business decisions in a wide variety of ways; for instance, advertisements for life insurance often encourage parents to think about the financial security of their children and other loved ones. |
| **Affiliation and belonging:** The needs for companionship, acceptance, love, popularity, and approval | The need to feel loved, accepted, or popular drives a great deal of human behavior, from the desire to be attractive to potential mates to wearing the clothing style that a particular social group is likely to approve. |
| **Power and control:** The need to feel in control of situations or to exert authority over others | You can see many examples appealing to this need in advertisements: *Take control of your life*, *your finances*, *your future*, *your career*, and so on. Many people who lack power want to know how to get it, and people who have power often want others to know they have it. |
| **Achievement:** The need to feel a sense of accomplishment—or to be admired by others for accomplishments | This need can involve both *knowing* (when people experience a feeling of accomplishment) and *showing* (when people are able to show others that they've achieved success); advertising for luxury consumer products frequently appeals to this need. |
| **Adventure and distraction:** The need for excitement or relief from daily routine | People vary widely in their need for adventure; some crave excitement—even danger—whereas others value calmness and predictability. Some needs for adventure and distraction are met *virtually*, such as through horror movies, thriller novels, etc. |
| **Knowledge, exploration, and understanding:** The need to keep learning | For some people, learning is usually a means to an end, a way to fulfill some other need; for others, acquiring new knowledge is the goal. |
| **Aesthetic appreciation:** The desire to experience beauty, order, symmetry, etc. | Although this need may seem "noncommercial" at first glance, advertisers appeal to it frequently, from the pleasing shape of a package to the quality of the gemstones in a piece of jewelry. |
| **Self-actualization:** The need to "be all that one can be," to reach one's full potential as a human being | Psychologists Kurt Goldstein and Abraham Maslow popularized self-actualization as the desire to make the most of one's potential, and Maslow identified it as one of the higher-level needs in his classic hierarchy; even if people met most or all of their other needs, they would still feel the need to self-actualize. An often-quoted example of appealing to this need is the U.S. Army's one-time advertising slogan "Be all that you can be." |
| **Helping others:** The need to believe that one is making a difference in the lives of other people | This need is the central motivation in fundraising messages and other appeals to charity. |

Positive language usually happens naturally with persuasive messages because you're promoting an idea or product you believe in. However, take care not to inadvertently insult your readers by implying that they've made poor choices in the past and that you're here to save them from their misguided ways.

Be sure to understand cultural expectations as well. For example, a message that seems forthright and direct in a low-context culture might seem brash and intrusive in a high-context culture.

Organizational culture can influence persuasion as much as social culture.

Just as social culture affects the success of a persuasive message, so too does the culture within an organization. For instance, some organizations handle disagreement and conflict in an indirect, behind-the-scenes way, whereas others accept and even encourage open discussion and sharing of differing viewpoints.

Finally, if you are trying to persuade a skeptical or hostile audience, you must convince them you know what you're talking about and that you're not trying to mislead them. Use these techniques:

Audiences often respond unfavorably to over-the-top language, so keep your writing simple and straightforward.

- Use simple language to avoid suspicions of fantastic claims and emotional manipulation.
- Provide objective evidence for the claims and promises you make.
- Identify your sources, especially if your audience already respects those sources.
- Establish common ground by emphasizing beliefs, attitudes, and background experiences you have in common with the audience.

- Be objective and present fair and logical arguments.
- Display your willingness to keep your audience's best interests at heart.
- Persuade with logic, evidence, and compelling narratives, rather than trying to coerce with high-pressure, "hard-sell" tactics.
- Whenever possible, try to build your credibility before you present a major proposal or ask for a major decision. That way, audiences don't have to evaluate both you and your message at the same time.[5]

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**Persuasion skills for every business professional**
Persuasion is an essential business skill, no matter what career path you follow. This video offers great tips for understanding, practicing, and applying persuasive skills. Go to **http://real-timeupdates .com/bce7.** Under "Students," click on "Learn More."

### STEP 3: COMPLETING PERSUASIVE MESSAGES

The pros know from experience that details can make or break a persuasive message, so they're careful not to skimp on this part of the writing process. For instance, advertisers may have a dozen or more people review a message before it's released to the public.

Careless production undermines your credibility, so revise and proofread with care.

When you evaluate your content, try to judge your argument objectively and try not to overestimate your credibility. When revising for clarity and conciseness, carefully match the purpose and organization to audience needs. If possible, ask an experienced colleague who knows your audience well to review your draft. Your design elements must complement, not detract from, your argument. In addition, meticulous proofreading will identify any mechanical or spelling errors that would weaken your persuasive potential. Finally, make sure your distribution methods fit your audience's expectations as well as your purpose.

## Developing Persuasive Business Messages

Your success as a businessperson is closely tied to your ability to encourage others to accept new ideas, change old habits, or act on your recommendations. Unless your career takes you into marketing and sales, most of your persuasive messages will consist of persuasive business messages, which are those designed to elicit a preferred response in a nonsales situation.

2 LEARNING OBJECTIVE
Describe an effective strategy for developing persuasive business messages.

Even if you have the power to compel others to do what you want them to do, persuading them is more effective than forcing them. People who are forced into accepting a decision or plan are less motivated to support it and more likely to react negatively than if they're persuaded.[6] Within the context of the three-step process, effective persuasion involves four essential strategies: framing your arguments, balancing emotional and logical appeals, reinforcing your position, and anticipating objections. (Note that all these concepts in this section apply as well to marketing and sales messages, covered later in the chapter.)

**MOBILE APPS**
Want to persuade your local government to address a problem? The City Sourced app aims to facilitate civic engagement through mobile communication.

### FRAMING YOUR ARGUMENTS

Many persuasive messages follow some variation of the indirect approach. One of the most commonly used variations is called the **AIDA model**, which organizes your message into four phases (see Figure 9.2 on the next page):

The AIDA model is a useful approach for many persuasive messages:
- Attention
- Interest
- Desire
- Action

- **Attention.** Your first objective is to encourage your audience to want to hear about your problem, idea, or new product—whatever your main idea is. Be sure to find some common ground on which to build your case.
- **Interest.** Provide additional details that prompt audience members to imagine how the solution might benefit them.
- **Desire.** Help audience members embrace your idea by explaining how the change will benefit them and answering potential objections.
- **Action.** Suggest the specific action you want your audience to take. Include a deadline, when applicable.

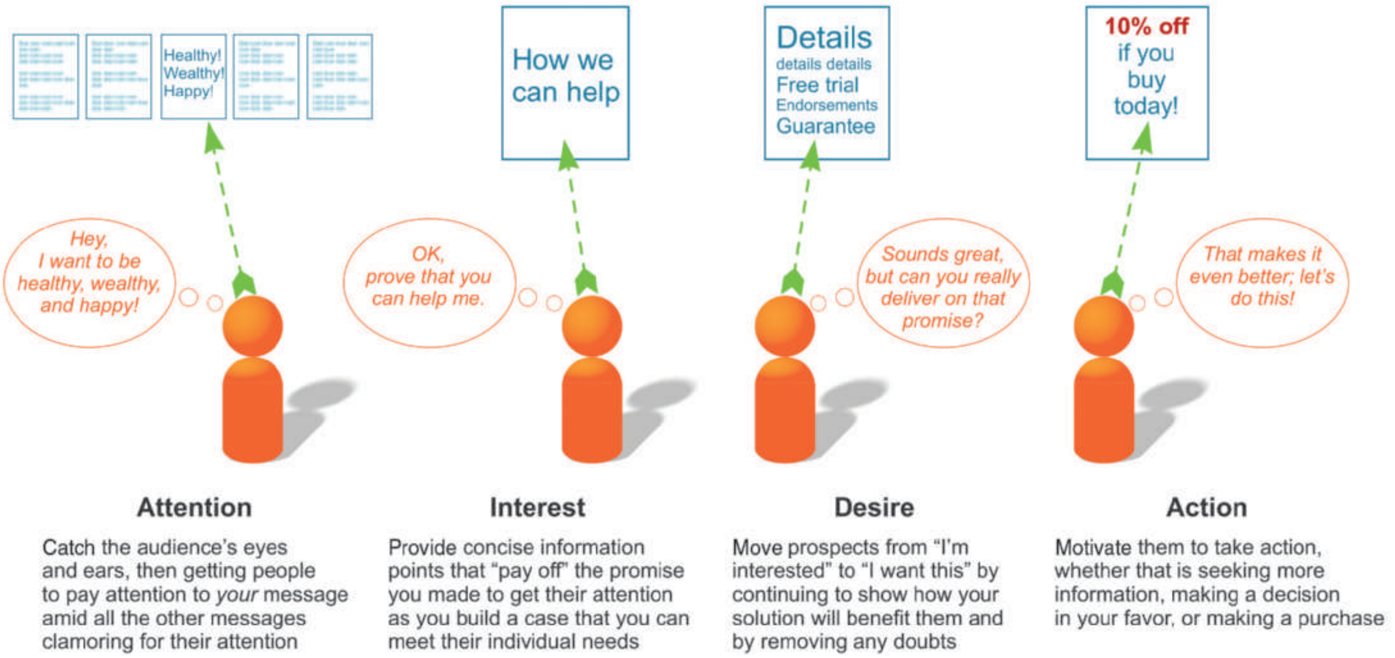


**Figure 9.2 The AIDA Model for Persuasive Messages**
With the AIDA model, you craft one or more messages to move recipients through four stages of attention, interest, desire, and action. The model works well for both persuasive business messages (such as persuading your manager to fund a new project) and marketing and sales messages.

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> LEARN MORE BY READING THIS ARTICLE
> **Using stories to persuade**
> Learn why stories are usually more effective than plain data when it comes to changing minds. Go to **http://real-timeupdates .com/bce7.** Under "Students," click on "Learn More."

The AIDA model is tailor-made for using the indirect approach, allowing you to save your main idea for the action phase. However, it can also work with the direct approach, in which case you use your main idea as an attention-getter, build interest with your argument, create desire with your evidence, and emphasize your main idea in the action phase with the specific action you want your audience to take.

The AIDA model is ideal for the indirect approach.

When your AIDA message uses the indirect approach and is delivered by memo or email, keep in mind that your subject line usually catches your reader's eye first. Your challenge is to make it interesting and relevant enough to capture reader attention without revealing your main idea. If you put your request in the subject line, you're likely to get a quick "no" before you've had a chance to present your arguments:

| Instead of This | Write This |
|---|---|
| Request for development budget to add automated IM response system | Reducing the cost of customer support inquiries |

The AIDA approach has limitations:
- It essentially talks *at* audiences, not *with* them
- It focuses on one-time events, not long-term relationships

With either the direct or indirect approach, AIDA and similar models do have limitations. First, AIDA is a unidirectional method that essentially talks *at* audiences, not *with* them. Second, AIDA is built around a single event, such as asking an audience for a decision, rather than on building a mutually beneficial, long-term relationship.[7] AIDA is still a valuable tool for the right purposes, but as you'll read later in the chapter, a conversational approach is more compatible with today's social media.

## BALANCING EMOTIONAL AND LOGICAL APPEALS

Emotional appeals attempt to connect with the reader's feelings or sympathies.

Few persuasive appeals are purely logical or purely emotional, and a key skill is finding the right balance for each message (see Figure 9.3). An **emotional appeal** calls on feelings or audience sympathies. For instance, you can make use of the emotions inspired by words

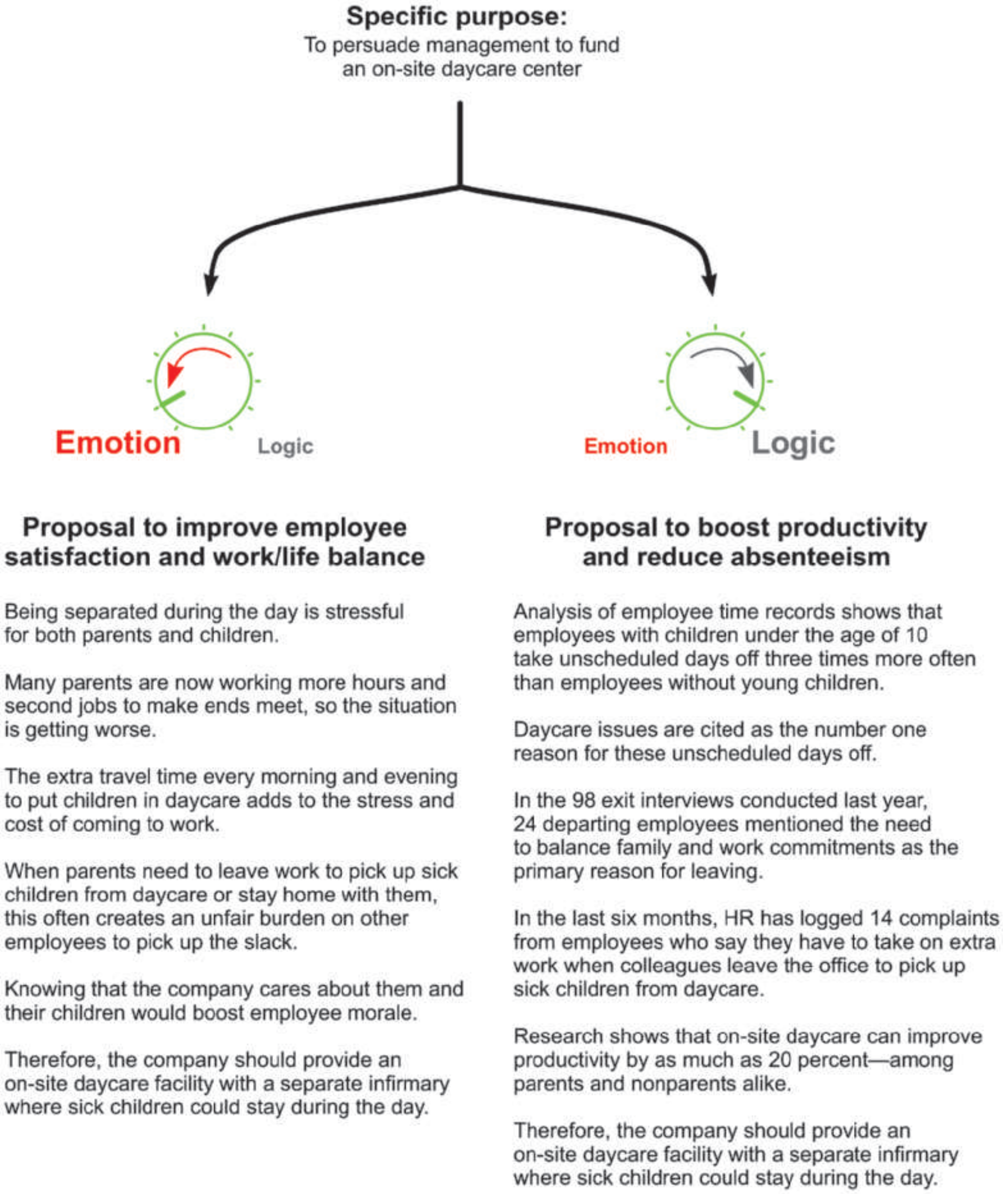


**Figure 9.3 Balancing Logical and Emotional Appeals**
Whenever you plan a persuasive message, imagine you have a knob that turns from *emotion* at one extreme to *logic* at the other, letting you adjust the relative proportions of each type of appeal. Compare these two outlines for a proposal that asks management to fund an on-site daycare center. The version on the left relies heavily on emotional appeals, whereas the version on the right uses logical appeals (inductive reasoning, specifically). Through your choice of words, images, and supporting details, you can adjust the emotional-logical ratio in every message.

such as *freedom*, *success*, *prestige*, *compassion*, *free*, and *comfort*. Such words put your audience in a certain frame of mind and help people accept your message.

Many marketing and sales messages rely heavily on emotional appeals, but most persuasive business messages rely more on logic. And even if your audience reaches a conclusion based on emotions, they'll look to you to provide logical support as well. A **logical appeal** uses one of three types of reasoning:

Logical appeals are based on the reader's notions of reason; these appeals can use analogy, induction, or deduction.

- **Analogy.** With analogy, you reason from specific evidence to specific evidence, in effect "borrowing" from something familiar to explain something unfamiliar. For instance, to convince management to add chat room capability to the company's groupware system, you could explain that it is like a neighborhood community center, only online.

- **Induction.** With inductive reasoning, you work from specific evidence to a general conclusion. To convince your boss to change a certain production process, you could point out that every company that has adopted it has increased profits.
- **Deduction.** With deductive reasoning, you work from a generalization to a specific conclusion. To persuade your boss to hire additional customer support staff, you might point to industry surveys that show how crucial customer satisfaction is to corporate profits.

Every method of reasoning is vulnerable to misuse. To avoid faulty logic, follow these guidelines:[8]

Using logical appeals carries with it the ethical responsibility to avoid faulty logic.

- **Avoid hasty generalizations.** Make sure you have plenty of evidence before drawing conclusions.
- **Avoid circular reasoning.** Circular reasoning is a logical fallacy in which you try to support your claim by restating it in different words. The statement "We know temporary workers cannot handle this task because temps are unqualified for it" doesn't prove anything because the claim and the supporting evidence are essentially identical.
- **Avoid attacking an opponent.** Attack the argument your opponent is making, not your opponent's character.
- **Avoid oversimplifying a complex issue.** For example, don't reduce a complex situation to a simple "either/or" statement if the situation isn't that simple or clear-cut.
- **Avoid mistaken assumptions of cause and effect.** If you can't isolate the impact of a specific factor, you can't assume that it's the cause of whatever effect you're discussing. You lowered prices, and sales went up. Were lower prices the cause? Maybe, but the sales increase might have been caused by a better advertising campaign, changes in the weather, or some other factor.
- **Avoid faulty analogies.** Be sure that the two objects or situations being compared are similar enough for the analogy to hold. For instance, explaining that an Internet firewall is like a prison wall is a poor analogy, because a firewall keeps things out, whereas a prison wall keeps things in.

## REINFORCING YOUR POSITION

Choose your words carefully to trigger the desired responses.

After you've worked out the basic elements of your argument, step back and look for ways to strengthen your position. Are all your claims supported by believable evidence? Would a quotation from a recognized expert help make your case?

Next, examine your language. Can you find more powerful words to convey your message? For example, if your company is in serious financial trouble, talking about *fighting for survival* is a more powerful emotional appeal than talking about *ensuring continued operations*. As with any other powerful tool, though, use vivid language and abstractions carefully and honestly.

In addition to examining individual word choices, consider using metaphors and other figures of speech. If you want to describe a quality-control system as being designed to detect every possible product flaw, you might call it a "spider web" to imply that it catches everything that comes its way. Similarly, anecdotes (brief stories) can help your audience grasp the meaning and importance of your arguments. Instead of just listing the number of times the old laptop computers in your department have failed, you could describe how you lost a sale when your computer broke down during a critical sales presentation.

Beyond specific words and phrases, look for other factors that can reinforce your position. When you're asking for something, your audience members will find it easier to grant your request if they stand to benefit from it as well.

## ANTICIPATING OBJECTIONS

Even powerful persuasive messages can encounter audience resistance.

Even compelling ideas and exciting projects can encounter objections, if only as a consequence of people's natural tendency to resist change. Anticipate likely objections and address them before your audience can bring them up. By doing so, you can remove these potentially negative elements from the conversation and keep the focus on positive communication.

Note that you don't need to explicitly mention a particular concern. For instance, if your proposal to switch to lower-cost materials is likely to raise concerns about quality, you can emphasize that the new materials are just as good as existing materials. You'll not only get this issue out of the way sooner but also demonstrate a broad appreciation of the issue and imply confidence in your message.[9]

If you expect a hostile audience that is biased against your plan, be sure to present all sides of the situation. As you cover each option, explain the pros and cons. You'll gain additional credibility if you mention these options before presenting your recommendation or decision.[10] If you can, involve your audience in the design of the solution; people are more likely to support ideas they help create.

If you expect to encounter strong resistance, present all sides of an issue.

### AVOIDING COMMON MISTAKES IN PERSUASIVE COMMUNICATION

When you believe in a concept or project you are promoting, it's easy to get caught up in your own confidence and enthusiasm and thereby fail to see things from the audience's perspective. When putting together persuasive arguments, avoid these common mistakes (see Figure 9.4 on the next page):[11]

- **Using a hard sell.** Don't push. No one likes being pressured into making a decision, and communicators who take this approach can come across as being more concerned with meeting their own goals than with satisfying the needs of their audiences. In contrast, a "soft sell" is more like a comfortable conversation that uses calm, rational persuasion.
- **Resisting compromise.** Successful persuasion is often a process of give-and-take, particularly in the case of persuasive business messages, where you don't always get everything you asked for in terms of budgets, investments, and other commitments.
- **Relying solely on great arguments.** Great arguments are important, but connecting with your audience on the right emotional level and communicating through vivid language are just as vital. Sometimes a well-crafted story can be even more compelling than dry logic.
- **Assuming that persuasion is a one-shot effort.** Persuasion is often a process, not a one-time event. In many cases, you need to move your audience members along one small step at a time rather than try to convince them to say "yes" in one huge step.

Don't let confidence or enthusiasm lead you to some common mistakes in persuasive communication.

## Common Examples of Persuasive Business Messages

Throughout your career, you'll have numerous opportunities to write persuasive messages within your organization—for example, when suggesting more-efficient operating procedures, asking for cooperation from other departments, pitching investors on a new business idea, or requesting adjustments that go beyond a supplier's contractual obligations. In addition, many of the routine requests you studied in Chapter 7 can become persuasive messages if you want a nonroutine result or believe that you haven't received fair treatment. Most of these messages can be divided into persuasive requests for action, persuasive presentation of ideas, and persuasive claims and requests for adjustment.

**3 LEARNING OBJECTIVE** Identify the three most common categories of persuasive business messages.

### PERSUASIVE REQUESTS FOR ACTION

The bulk of your persuasive business messages will involve requests for action. In some cases, your request will be anticipated, so the direct approach is fine. In others, you'll need to introduce your intention indirectly, and the AIDA model or a similar approach is ideal for this purpose (see Figure 9.5 on page 265).

Open with an attention-getting device and show readers that you understand their concerns. Use the interest and

Most persuasive business messages involve a request for action.

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Try these tips when you're crafting persuasive appeals. Go to **http://real-timeupdates.com/bce7.** Under "Students," click on "Learn More."

**Poor**

It's time to call the Fast Track program what it truly is—a disaster. Everyone was excited last year when we announced the plan to speed up our development efforts and introduce at least one new product every month. We envisioned rapidly expanding market share and strong revenue growth in all our product lines. What we got instead is a nightmare that is getting worse with every launch.

As a company, we clearly underestimated the resources it would take to market, sell, and support so many new products. We can't hire and train fast enough, and our teams in every department are overwhelmed. Forced to jump from one new product to the next, with no time to focus, the sales and technical specialists can't develop the expertise needed to help buyers before the sale or support them after the sale. As a result, too many customers either buy the wrong product or buy the right product but then can't get knowledgeable help when they need it. We're losing credibility in the market, we're starting to lose sales, and it won't be long before we start losing employees who are fed up with the insanity.

To make matters even worse, some of the recent products were clearly rushed to market before they were ready, with hardware quality problems and buggy software. Returns and warranty costs are skyrocketing.

New products are the lifeblood of the company, to be sure, but there is no point in introducing products that only create enormous support headaches and cost more to support than they generate in profits. We need to put the Fast Track initiative on hold immediately so the entire company can regroup. The R&D lab can devote its time to fixing problems in the recent products, and the rest of us can catch our collective breath and figure out how to meet our sales and support goals with the current product portfolio and our current staffing levels.

The company has clearly staked a lot on this program, so opening by calling it a disaster will only put the reader on the defensive.

Word choices such as *nightmare* and *insanity* give the message an emotional, almost hysterical, tone that detracts from the serious message.

The writer mingles an observation that may be subjective (declining credibility), a hard data point (declining sales), and a prediction (possibility of employee defections).

The claim that recent products were "clearly rushed to market" is unnecessarily inflammatory (because it blames another department) and distracts the reader from the more immediate problems of poor quality.

The first sentence of the last paragraph is insulting to anyone with basic business sense—particularly the president of a company.

**Improved**

Everyone was excited last year when we launched the Fast Track program to speed up our development efforts and introduce at least one new product every month. We envisioned rapidly expanding market share and strong revenue growth in all our product lines.

While the R&D lab has met its goal of monthly releases, as a company, we clearly underestimated the resources it would take to market, sell, and support so many new products. We can't hire and train fast enough, and our teams in every department are overwhelmed. The sales and technical specialists haven't had time to develop the expertise needed to help buyers before the sale or support them after the sale. As a result, too many customers either buy the wrong product or buy the right product but then can't get knowledgeable help when they need it.

We're losing credibility in the market, and we're starting to lose sales. If the situation continues, I fear we will being losing employees, too.

In addition, some of the recent products are generating multiple reports of hardware quality problems and buggy software. Returns and warranty costs are climbing at an unprecedented rate.

With costs rising faster than revenues and our people getting overwhelmed, I believe it is time to put the Fast Track initiative on hold until the company can regroup. The hiatus would give R&D time to address the quality problems and give the marketing, sales, and tech support team the chance to re-assess our goals with the current product portfolio and our current staffing levels.

This neutral summary of events serves as an effective buffer for the indirect approach and provides a subtle reminder of the original goals of the program.

This paragraph contains the same information as the poor version, but does so in a calmer way that is less likely to trigger the reader's defense mechanisms and thereby keeps the focus on the facts.

Notice how the writer separates a personal hunch (about the possibility of losing employees) from an observation about the market and a measured data point.

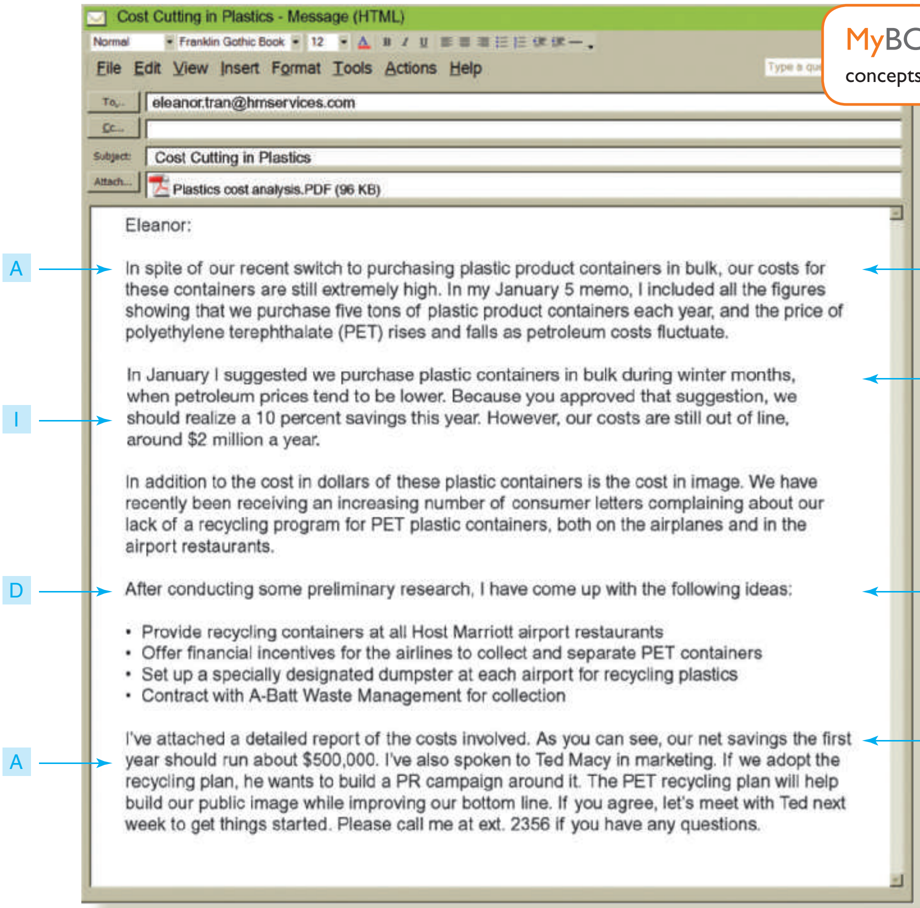
The information about the quality problems is introduced without directing blame.

With the evidence assembled, the writer introduces the main idea of putting the program on hold. The recommendation is a judgment call and a suggestion to a superior, so the hedging clause *I believe* is appropriate.

**Figure 9.4 Persuasive Argumentation**

Imagine you're the marketing manager in a company that decided to speed up its new product launches but did too much too fast and wound up creating chaos. You decide enough is enough and write a memo to the company president advocating that the new program be shut down until the company can regroup—a suggestion you know will meet with resistance. Notice how the poor version doesn't quite use the direct approach but comes out swinging, so to speak, and is overly emotional throughout. The improved version builds to its recommendation indirectly, using the same information but in a calm, logical way. Because it sticks to the facts, it is also shorter.

MyBCommLab Apply Figure 9.5's key concepts by going to **mybcommlab.com**



Cost Cutting in Plastics - Message (HTML)

File Edit View Insert Format Tools Actions Help

To... eleanor.tran@hmservices.com

Cc...

Subject: Cost Cutting in Plastics

Attach... Plastics cost analysis.PDF (96 KB)

Eleanor:

In spite of our recent switch to purchasing plastic product containers in bulk, our costs for these containers are still extremely high. In my January 5 memo, I included all the figures showing that we purchase five tons of plastic product containers each year, and the price of polyethylene terephthalate (PET) rises and falls as petroleum costs fluctuate.

In January I suggested we purchase plastic containers in bulk during winter months, when petroleum prices tend to be lower. Because you approved that suggestion, we should realize a 10 percent savings this year. However, our costs are still out of line, around $2 million a year.

In addition to the cost in dollars of these plastic containers is the cost in image. We have recently been receiving an increasing number of consumer letters complaining about our lack of a recycling program for PET plastic containers, both on the airplanes and in the airport restaurants.

After conducting some preliminary research, I have come up with the following ideas:

- Provide recycling containers at all Host Marriott airport restaurants
- Offer financial incentives for the airlines to collect and separate PET containers
- Set up a specially designated dumpster at each airport for recycling plastics
- Contract with A-Batt Waste Management for collection

I've attached a detailed report of the costs involved. As you can see, our net savings the first year should run about $500,000. I've also spoken to Ted Macy in marketing. If we adopt the recycling plan, he wants to build a PR campaign around it. The PET recycling plan will help build our public image while improving our bottom line. If you agree, let's meet with Ted next week to get things started. Please call me at ext. 2356 if you have any questions.



**Figure 9.5 Persuasive Message Using the AIDA Model**
This message uses the AIDA model in a persuasive message about a program that would try to reduce Host Marriott's annual plastics costs and curtail consumer complaints about the company's recycling record. Note how the writer "sells the problem" before attempting to sell the solution. Few people are interested in hearing about solutions to problems they don't know about or don't believe exist. The interest section introduces an additional, unforeseen problem with plastic product containers.

desire sections of your message to demonstrate that you have good reason for making such a request and to cover what you know about the situation: the facts and figures, the benefits of helping, and any history or experience that will enhance your appeal. Your goals are (1) to gain credibility (for yourself and your request) and (2) to make your readers believe that helping you will indeed help solve a significant problem. Close with a request for some specific action, and make that course of action as easy to follow as possible to maximize the chances of a positive response.

## PERSUASIVE PRESENTATION OF IDEAS

Sometimes the objective of persuasive messages is simply to encourage people to consider a new idea.

You may encounter situations in which you simply want to change attitudes or beliefs about a particular topic, without asking the audience to decide or do anything—at least not yet. The goal of your first message might be nothing more than convincing your audience to reexamine long-held opinions or to admit the possibility of new ways of thinking.

For instance, the World Wide Web Consortium, a global association that defines many of the guidelines and technologies behind the World Wide Web, launched a campaign called the Web Accessibility Initiative. Although the consortium's ultimate goal is making websites more accessible to people who have disabilities or age-related limitations, a key interim goal is simply making website developers more aware of the need. As part of this effort, the consortium has developed a variety of presentations and documents that highlight the problems many web visitors face.[12]

### PERSUASIVE CLAIMS AND REQUESTS FOR ADJUSTMENTS

Most claims are routine messages and use the direct approach discussed in Chapter 7. However, consumers and business professionals sometimes encounter situations in which they believe they haven't received a fair deal by following normal procedures. These situations require a more persuasive message.

The key ingredients of a good persuasive claim are a complete and specific review of the facts and a confident and positive tone based on your right to be satisfied with every transaction. Begin persuasive claims by outlining the problem and continue by reviewing what has been done about it so far, if anything. The recipient might be juggling numerous claims and other demands on his or her attention, so be clear, calm, and complete when presenting your case. Be specific about how you would like to see the situation resolved.

Next, give your reader a good reason for granting your claim. Show how the individual or organization is responsible for the problem, and appeal to your reader's sense of fair play, goodwill, or moral responsibility. Explain how you feel about the problem, but don't get carried away and don't make threats. People generally respond most favorably to requests that are calm and reasonable. Close on a respectful note that reflects how a successful resolution of the situation will repair or maintain a mutually beneficial working relationship.

## Developing Marketing and Sales Messages

**4** LEARNING OBJECTIVE
Describe an effective strategy for developing marketing and sales messages, explain how to modify this approach for social media, and identify steps you can take to avoid ethical lapses in marketing and sales messages.

Marketing and sales messages use the same basic techniques as other persuasive messages, with the added emphasis of encouraging someone to participate in a commercial transaction. Although the terms *marketing message* and *sales message* are often used interchangeably, there is an important difference: **Marketing messages** usher potential buyers through the purchasing process without asking them to make an immediate decision. **Sales messages** take over at that point, encouraging potential buyers to make a purchase decision then and there. Marketing messages focus on such tasks as introducing new brands to the public and encouraging customers to visit websites for more information, whereas sales messages make an explicit request for people to buy a specific product or service. (The text of marketing and sales messages is usually referred to as "copy," by the way.)

Marketing and sales messages use many of the same techniques as persuasive business messages.

Most marketing and sales messages, particularly in larger companies, are created and delivered by professionals with specific training in marketing, advertising, sales, or public relations. However, you may be called on to review the work of these specialists or even to write such messages in smaller companies, and having a good understanding of how these messages work will help you be a more effective manager.

### PLANNING MARKETING AND SALES MESSAGES

Everything you've learned about planning messages applies in general to marketing and sales messages, but the planning steps for these messages have some particular aspects to consider as well:

Understanding the purchase decision from the buyer's perspective is a vital step in framing an effective marketing or sales message.

- **Assessing audience needs.** As with every other business message, successful marketing and sales messages start with an understanding of audience needs. Depending on the product and the market, these considerations can range from a few functional factors (such as the size, weight, and finish of office paper) to a complicated mix of emotional and logical issues (all the factors that play into buying a house, for example).
- **Analyzing your competition.** Marketing and sales messages nearly always compete with messages from other companies trying to reach the same audience. When Nike plans a marketing campaign to introduce a new shoe model to current customers, the company knows its audience has also been exposed to messages from

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See the powerful influence of color in marketing and sales messages. Go to **http://real-timeupdates.com/bce7.** Under "Students," click on "Learn More."

Adidas, New Balance, Reebok, and numerous other shoe companies. Finding a unique message in crowded markets can be quite a challenge.

- **Determining key selling points and benefits.** With some insight into audience needs and the alternatives offered by your competitors, the next step is to decide which features and benefits to highlight. **Selling points** are the most attractive features of a product, whereas benefits are the particular advantages purchasers can realize from those features. In other words, selling points focus on what the product does. **Benefits** focus on what the user experiences or gains. Benefits can be practical, emotional, or a combination of the two. For example, the feature of a thin, flexible sole in a running shoe offers the practical benefit of a more natural feel while running. In contrast, the visual design features of the shoe offer no practical benefits but can offer the emotional benefit of wearing something stylish or unusual.

Selling points focus on the product; benefits focus on the user.

- **Anticipating purchase objections.** Marketing and sales messages usually encounter objections, and, as with persuasive business messages, the best way to handle them is to identify these objections up front and address as many as you can. Objections can range from high price or low quality to a lack of compatibility with existing products or a perceived risk involved with the product. By identifying potential objections up front, you can craft your promotional messages in ways that address those concerns. If price is a likely objection, for instance, you can look for ways to increase the perceived value of the purchase and decrease the perception of high cost. When promoting a home gym, you might say that it costs less than a year's worth of health club dues. Of course, any attempts to minimize perceptions of price or other potential negatives must be done ethically.

Anticipating objections is crucial to effective marketing and sales messages.

## WRITING CONVENTIONAL MARKETING AND SALES MESSAGES

Conventional marketing and sales messages are often prepared using the AIDA model or some variation of it. (See the next section on crafting messages for social media.) Here are the key points of using the AIDA model for these messages:

- **Getting the reader's attention.** By looking and listening during any given day, you'll notice the many ways advertisers try to get your attention. For example, a headline might offer an exciting product benefit, a piece of interesting news, an appeal to people's emotions or sense of financial value, or a unique solution to a common problem. Of course, words aren't the only attention-getting devices. Depending on the medium, marketers can use evocative images, music, animation, or video. "Cutting through the clutter" to get the audience's attention is one of the biggest challenges with marketing and sales messages.
- **Building interest.** After catching the reader's or viewer's attention, your next step is to build interest in the product, company, or idea you are promoting. A common technique is to "pay off" the promise made in the headline by explaining how you can deliver those benefits. For example, if the headline offers a way to "Get Fit for $2 a Day," the first paragraph could explain that the home gyms your company sells start at less than $700, which works out to less than $2 a day over the course of a year.

To build interest, expand on and support the promises in your attention-getting opening.

- **Increasing desire.** Now that you've given the audience some initial information to start building interest, the next step is to boost desire for the product by expanding on your explanation of its benefits. Think carefully about the sequence of support points and use plenty of subheadings, hyperlinks, video demonstrations, and other devices to help people quickly find the information they need. By keeping the focus on potential customers and their practical and emotional needs, you can layer on information that helps convince people that your product really is the best solution for them. You can also use a variety of techniques to address potential objections and minimize doubts, including testimonials from satisfied users, articles written by industry experts, competitive comparisons, offers of product samples or free demonstrations, independent test results, and money-back guarantees.

Add details and audience benefits to increase desire for the product or service.

- **Motivating action.** The final step in the AIDA model is persuading the audience to take action, such as encouraging people to pick up the phone to place an order or visit an online app store to download your software. The keys to a successful call to action are making it easy and as risk-free as possible. If the process is confusing or time-consuming, you'll lose potential customers.

After you've generated sufficient interest and desire, you're ready to persuade readers to take the preferred action.

If you analyze the advertisements you encounter day to day, you'll see variations on these techniques used again and again.

## WRITING PROMOTIONAL MESSAGES FOR SOCIAL MEDIA

**MOBILE APPS**
Talkwalker helps companies monitor social media conversations in real time.

The AIDA model and similar approaches have been successful with marketing and sales messages for decades, but in the social media landscape consumers are more apt to look for product information from other consumers, not the companies marketing those products. Consequently, your emphasis should shift to encouraging and participating in online conversations. Follow these guidelines (see Figure 9.6):[13]

In a social media environment, persuasive efforts require a more conversational, interactive approach.

- **Facilitate community building.** Give customers and other audiences an opportunity to connect with you and one another, such as on your Facebook page or through members-only online forums.
- **Listen at least as much as you talk.** Listening is just as essential for online conversations as it is for in-person conversations.
- **Initiate and respond to conversations within the community.** Through content on your website, blog postings, social network profiles and messages, newsletters, and other tools, make sure you provide the information customers need in order to evaluate your products and services. Use an objective, conversational style; people in social networks want useful information, not "advertising speak."
- **Provide information people want.** Whether it's industry-insider news, in-depth technical guides to using your products, or brief answers to questions posted on community Q&A sites, fill the information gaps about your company and its products.
- **Identify and support your champions.** In marketing, champions are enthusiastic fans of your company and its products. Champions are so enthusiastic they help


MyBCommLab Apply Figure 9.6's key concepts by going to **mybcommlab.com**

**Figure 9.6 Persuasive Messages in Social Media**
From online video to Twitter updates, persuasive messages in social media are generally more effective when they are conversational (rather than blatantly promotional) and when they offer something of value to readers. Deloitte, for example, offers a wealth of free business strategy information on its website and uses Twitter to announce new material.
*Source:* Deloitte Global Services Twitter page. Copyright © 2012 Deloitte Global Services Limited. Reprinted with permission.

spread your message (through their blogs, for instance), defend you against detractors, and help other customers use your products.

- **Be real.** Social media audiences respond positively to companies that are open and conversational about themselves, their products, and subjects of shared interest. In contrast, if a company is serving its stakeholders poorly with shoddy products, bad customer service, or unethical behavior, an attempt to improve its reputation by adopting social media without fixing the underlying problems is likely to fail as soon as audiences see through the superficial attempt to "be social."
- **Integrate conventional marketing and sales strategies at the right time and in the right places.** AIDA and similar approaches are still valid for specific communication tasks, such as conventional advertising and the product promotion pages on your website.

## CREATING PROMOTIONAL MESSAGES FOR MOBILE DEVICES

Mobile advertising and mobile commerce (sometimes referred to as *m-commerce*) are two of the hottest developments in marketing communications. Mobile advertising is already a multibillion-dollar business, with nearly 70 percent of ad dollars spent on Google and Facebook ads.[14] The types of marketing and sales messages created for mobile audiences range from short, simple text ads that appear next to search engine results to mobile-optimized video—the most common form of content marketing in the mobile arena.[15]

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Companies are putting so much emphasis on mobile marketing because mobile devices now play such a big role in consumer buying behavior. Smartphone owners tend to use their devices for many shopping-related tasks, from searching for product reviews to finding stores and service businesses, looking for coupons and other promotions, and doing in-store price comparisons. In fact, some 80 percent of smartphone-equipped consumers use their devices to get shopping-related information.[16]

If you are involved with creating mobile marketing or sales messages, keep two essential points in mind. First, like all mobile messages, promotional messages need to be kept short and simple. Second, the mobile experience needs to be fast and straightforward. Mobile users are often time-constrained, and they will quickly abandon websites that don't load quickly or are confusing to navigate.

Promotional messages aimed at mobile audiences need to be short, simple, and easy to respond to.

## MAINTAINING HIGH ETHICAL AND LEGAL STANDARDS

The word *persuasion* has negative connotations for some people, especially in a marketing or sales context. However, ethical businesspeople view persuasion as a positive force, a way to align their own interests with what is best for their audiences. They influence audience members by providing information and aiding understanding, which allows audiences the freedom to choose.[17]

As marketing and selling grow increasingly complex, so do the legal ramifications of marketing and sales messages. In the United States, the Federal Trade Commission (FTC) and other federal, state, and local authorities can penalize advertisers that violate standards for truthful advertising and other regulations. All marketers need to understand these basic legal aspects of promotional communication:[18]

Marketing and sales messages are covered by a wide range of laws and regulations.

- **Marketing and sales messages must be truthful and nondeceptive.** The FTC considers messages to be deceptive if they (a) include statements that are likely to mislead reasonable customers and the statements are an important part of the purchasing decision, (b) fail to include important information, or (c) imply deceptive claims without actually making them.
- **You must back up your claims with evidence.** According to the FTC, offering a money-back guarantee or providing letters from satisfied customers is not enough; you must still be able to support your claims with objective evidence such as a survey or scientific study.

- **"Bait and switch" advertising is illegal.** Trying to attract buyers by advertising a product that you don't intend to sell—and then trying to sell them another (and usually more expensive) product—is illegal.
- **Marketing messages and websites aimed at children are subject to special rules.** For example, online marketers must obtain consent from parents before collecting personal information about children under age 13.
- **Marketing and sales messages are considered binding contracts in many states.** If you imply or make an offer and then can't fulfill your end of the bargain, you can be sued for breach of contract.
- **In most cases, you can't use a person's name, photograph, or other identity without permission.** Doing so is considered an invasion of privacy. You can use images of people considered to be public figures as long as you don't unfairly imply that they endorse your message.

Marketers have a responsibility to stay up to date on laws and regulations that restrict promotional messages.

Marketers also need to be up to date on the latest regulations affecting "spam" (unsolicited bulk email), customer privacy, and data security.

For the latest information on writing persuasive messages, visit **http://real-timeupdates.com/bce7** and click on Chapter 9.

# Chapter Review and Activities

## Learning Objectives: Check Your Progress

**Objective 1: Apply the three-step writing process to persuasive messages.**

To plan persuasive messages, carefully clarify your purpose to make sure you focus on a single goal. Understand audience needs, which can involve research to identify relevant demographic and psychographic variables and to assess audience motivations. Persuasive messages usually ask people to give up time, money, or other resources, so gathering the right information to convince readers of the benefits of responding is essential. Media choices need to be considered carefully, particularly with marketing and sales messages in a social media landscape. For organizing persuasive messages, you will usually want to choose the indirect approach in order to establish awareness and interest before asking the audience to take action.

When writing persuasive messages, use positive and polite language, understand and respect cultural differences, be sensitive to organizational cultures when writing persuasive business messages, and take steps to establish your credibility. Seven common ways to establish credibility in persuasive messages are using simple language, supporting your claims, identifying your sources, establishing common ground, being objective, displaying good intentions, and avoiding the hard sell.

The steps for completing persuasive messages are the same as for other types of messages, but accuracy and completeness are especially important because they send signals about your credibility—a crucial element in persuasive messages.

**Objective 2: Describe an effective strategy for developing persuasive business messages.**

Within the context of the three-step process, effective persuasion involves four essential strategies: framing your arguments, balancing emotional and logical appeals, reinforcing your position, and anticipating objections. One of the most commonly used methods for framing a persuasive argument is the AIDA model, in which you open your message by getting the audience's attention; build interest with facts, details, and additional benefits; increase desire by providing more evidence and answering possible objections; and motivate a specific action.

Persuasive business messages combine emotional appeals (which call on feelings and sympathies) and logical appeals (which call on reason, using analogy, induction, or deduction). To reinforce your position, look for ways to add convincing evidence, quotations from experts, or other support material.

By identifying potential objections and addressing them as you craft your message, you can help prevent audience members from gravitating toward negative answers before you have the opportunity to ask them for a positive response. You can often resolve these issues before the audience has a chance to go on the defensive.

**Objective 3: Identify the three most common categories of persuasive business messages.**

The most common types of these messages are (1) persuasive requests for action, in which you ask the recipient to make a decision or engage in some activity; (2) persuasive presentations of ideas, in which you aren't necessarily looking for a decision or action but rather would like the audience to consider a different way of looking at a particular topic; and (3) persuasive claims and requests for adjustments, in which you believe you have not received fair treatment under an organization's standard policies and would like the recipient to give your case fresh consideration.

**Objective 4: Describe an effective strategy for developing marketing and sales messages, explain how to modify this approach for social media, and identify steps you can take to avoid ethical lapses in marketing and sales messages.**

Marketing and sales messages use the same basic techniques as other persuasive messages, with the added emphasis of encouraging someone to participate in a commercial transaction.

Marketing messages do this indirectly, whereas sales messages do it directly. The basic strategy for creating these messages includes assessing audience needs; analyzing your competition; determining key selling points and benefits; anticipating purchase objections; applying the AIDA model; adapting your writing to social media, if appropriate; and maintaining high standards of ethical and legal compliance.

To use social media for promotional communication, start by engaging audiences with efforts to build networked communities of potential buyers and other interested parties. Listen to conversations taking place about your company and its products. Initiate and respond to conversations within these communities, being sure to use an objective, conversational style. Provide the information interested parties want. Identify and support the enthusiastic product champions who want to help spread your message. Be authentic and transparent in all your communication. Speak directly to customers so you don't have to rely on the news media. Finally, continue to use the AIDA model or similar approaches, but only at specific times and places.

Effective and ethical persuasive communicators focus on aligning their interests with the interests of their audiences. They help audiences understand how their proposals will provide benefits to the audience, using language that is persuasive without being manipulative. They choose words that are less likely to be misinterpreted and take care not to distort the truth. Throughout, they maintain a "you" attitude with honest concern for the audience's needs and interests.

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## Test Your Knowledge

To review chapter content related to each question, refer to the indicated Learning Objective.

**9-1.** What are the four tasks that should be adhered to at the planning stage while creating persuasive messages? [LO-1]

**9-2.** Identify the three common categories of persuasive messages. [LO-3]

**9-3.** What three types of reasoning can you use in logical appeals? [LO-2]

**9-4.** What is the AIDA model, and what are its limitations? [LO-2]

**9-5.** Why do promotional messages need to be short and simple on mobile devices? [LO-4]

## Apply Your Knowledge

To review chapter content related to each question, refer to the indicated Learning Objective.

**9-6.** When writing persuasive messages, why is it so important to give special attention to the analysis of your purpose and audience? [LO-1]

**9-7.** Can a person's reasoning in a logical appeal be misguided? If so, how? [LO-2]

**9-8.** What is likely to happen if a promotional message starts immediately with a call to action? Why? [LO-4]

**9-9.** Are emotional appeals ethical? Why or why not? [LO-4]

## Practice Your Skills

### Exercises for Perfecting Your Writing

To review chapter content related to each set of exercises, refer to the indicated Learning Objective.

**Message Strategies: Persuasive Business Messages; Collaboration: Team Projects [LO-2]:** With another student, analyze the persuasive email message at Host Marriott (Figure 9.5 on page 265) by answering the following questions.

**9-10.** What techniques are used to capture the reader's attention?

**9-11.** Does the writer use the direct or indirect organizational approach? Why?

**9-12.** Is the subject line effective? Why or why not?

**9-13.** Does the writer use an emotional appeal or a logical appeal? Why?

**9-14.** What reader benefits are included?

**9-15.** How does the writer establish credibility?

**9-16.** What tools does the writer use to reinforce his position?

**Message Strategies: Persuasive Business Messages; Mobile Skills [LO-2]:** Compose effective subject lines for the following email messages. Make sure they are mobile-friendly.

**9-17.** A business message sent to all department heads introducing a draft proposal on ethical standards. This proposal has been established with knowledge of the rise in sexual harassment cases in the office and the threat of lawsuits looming large.

**9-18.** A sales brochure to be sent to area residents, soliciting customers for your new business, "Meals à la Car," a carryout dining service that delivers from most local restaurants. Diners place orders online, and individual households can order from up to three restaurants at a time to accommodate different tastes. The price is equal to the standard menu prices plus a 10 percent delivery charge.

**9-19.** A directive requesting sales executives to submit their monthly sales reports to their respective managers by the 25th of each month. The directive also requests these sales managers to then compile each report and submit their territory reports to the national sales manager by the 28th of that month. Sales personnel not complying with these schedules will forfeit their incentives for that month.

**Message Strategies: Marketing and Sales Messages [LO-4]:** Determine whether the following sentences focus on features or benefits; rewrite them as necessary to focus on benefits.

**9-20.** All-Cook skillets are coated with a durable, patented nonstick surface.

**9-21.** Being an avid gamer, he noticed a laptop in the far corner of the room that had the best graphics card installed.

**9-22.** With 8-millisecond response time, the Samsung LN-S4095D 40″ LCD TV delivers fast video action that is smooth and crisp.[19]

## Activities

Each activity is labeled according to the primary skill or skills you will need to use. To review relevant chapter content, you can refer to the indicated Learning Objective. In some instances, supporting information will be found in another chapter, as indicated.

**9-23. Message Strategies: Persuasive Business Messages; Media Skills: Podcasting [LO-2], Chapter 6** To access this message, visit http://real-timeupdates.com/bce7, click on Student Assignments, and click on Chapter 9, Activity 1. Listen to this podcast and identify at least three ways in which the podcast could be more persuasive. Draft a brief email message that you could send to the podcaster with your suggestions for improvement.

**9-24. Message Strategies: Persuasive Business Messages [LO-3]** Read the following message and (a) analyze the strengths and weaknesses of each sentence and (b) revise the document so that it follows this chapter's guidelines.

Dear members of the school staff,

I am writing to you with utter disappointment after having received numerous complaints from both students and their wards. It appears that many of you, despite being armed with a degree in education and trained in teaching methodologies, have failed to deliver your subject matter in a manner easily understood by students. It has been reported that many teachers have been reading out from textbooks without using any teaching aids to explain the finer nuances to students. As a result, students have failed to grasp the essence of these subjects and have resorted to learning by rote.

The management has noted the complaints against these teachers and expects each one to pay the utmost attention to a student's learning abilities. Each of you is to send in a report about the changes you plan to bring about over the next month.

**9-25. Message Strategies: Persuasive Business Messages [LO-3]** The following persuasive request for adjustment contains numerous flaws. Read the message carefully and analyze its faults. Then determine whether to use the direct or indirect approach and write an improved message.

March 22, 2015

Mr. Robert Bechtold, ManagerKukyendahl Joint, Inc.88
North Park RoadHouston, TX 77005

Re: Last Warning

Dear Mr. Bechtold:

Enclosed is a summary of recent ETS-related court cases in which landlords and owners were held responsible for providing toxin-free air for their tenants. In most of these cases, owners were also required to reimburse rents and pay damages for the harm done before the environmental tobacco smoke problem was remedied.

We've been plagued with this since we moved in on January 2, 2012. You haven't acted on our complaints, or responded to our explanations that secondhand smoke is making us sick, filtering in from nearby offices. You must act now or you will be hearing from our lawyers. We've told you that we were forced to hire contractors to apply weather stripping and seal openings. This cost us $3,000 (bills attached) and we expect reimbursement. But the smoke is still coming in. We also want a refund for the $9,000 we've paid you in rent since January. Call us immediately at (832) 768-3899, or our attorneys will be calling you.

Cigarette smoke from tenants on either side of us, and perhaps above and below as well, has been infiltrating our space and you have done nothing, despite our pleas, to stop it. This is unacceptable. This is a known human carcinogen. Ask the Environmental Protection Agency, which classified it as this Group A toxin. It causes lung, breast, cervical, and endocrine cancer in nonsmokers. You wouldn't want to breathe it, either.

One employee already quit who suffered from asthma. Another is threatening because he's a high risk for heart attack. Migraines, bronchitis, respiratory infections—all caused by the 4,600 chemicals in ETS, including poisons such as cyanide, arsenic, formaldehyde, carbon monoxide, and ammonia. We've had them all—the illnesses, that is.

Secondhand smoke is even more dangerous than what smokers inhale, since the inhalation process burns off some of the toxins. Sick time has already cost CMSI valuable business and lowered productivity. Plus many of us are considering finding other jobs unless our office air becomes safe to breathe again. But as the court cases prove, the responsibility for fixing this problem is yours. We expect you to live up to that responsibility immediately. Frankly, we're fed up with your lack of response.

Kathleen Thomas
Manager

**9-26. Message Strategies: Marketing and Sales Messages [LO-4]** Read the following message and (a) analyze the strengths and weaknesses of each sentence and (b) revise the document so that it follows this chapter's guidelines.

At Tolson Auto Repair, we have been in business for over 25 years. We stay in business by always taking into account what the customer wants. That's why we are writing. We want to know your opinions to be able to better conduct our business.

Take a moment right now and fill out the enclosed questionnaire. We know everyone is busy, but this is just one way we have of making sure our people do their job correctly. Use the enclosed envelope to return the questionnaire.

And again, we're happy you chose Tolson Auto Repair. We want to take care of all your auto needs.

**9-27. Message Strategies: Marketing and Sales Messages [LO-4]** Read the following message and (a) analyze the strengths and weaknesses of each sentence and (b) revise the document so that it follows this chapter's guidelines.

Crankstein and Crick is the best name in real estate in the West Coast province. From residential apartments and condos to commercial space, we deliver a range of properties that suits every lifestyle and budget. We are the best in quality and design, and our motto is "Look no further." Our latest offering is our child-centric homes, which have caught the attention of many newlywed couples. These homes are equipped with child-friendly amenities and the highest security standards. We would be happy if you visited our site office at 22 Norfox Street.

**9-28. Message Strategies: Marketing and Sales Messages [LO-4]** Use what you know about sales messages to analyze the flaws in this promotional brochure, then revise it to produce a better version.

> We are pleased to announce that ScrubaDub has added a new service, the Car Care Club.
>
> It costs $5.95 for a lifetime membership (your car's lifetime) and features our computer automation. You'll be given a bar-coded sticker for your windshield so our computers can identify you as a club member when you pull in. If you sign up within the next 30 days, we will grant you a SuperWash for free.
>
> The new club offers the standard ScrubaDub Touch-less systems to protect your finishes, our private formula Superglo detergent to clean your car safely and thoroughly, wheel sensors to prescribe the right treatment for whitewalls, wire, or chrome, soft, heated well water to eliminate spots, soft-cloth drying for final gloss. We also recycle our water and grant you a free wash on your birthday.
>
> In addition, club members only will have access to a 48-hour guarantee (free rewashes) or 4 days if you purchased the premium Super Wash, Luxury Wash, Special or Works Wash. After ten washes, our computer will award you a free wash. Also available only to club members are $5 rebates for foam waxes (Turtle Wax, Simonize, or Blue Coral). Some additional specials will be granted by us to car club members, on an unplanned basis.
>
> We can handle special requests if you inquire of our Satisfaction Supervisors. We honor our customers with refunds if they remain unsatisfied after a rewash. This is our Bumper-to-Bumper Guarantee.

**9-29. Communication Ethics: Making Ethical Choices [LO-4], Chapter 1** Your boss has asked you to post a message on the company's internal blog, urging everyone in your department to donate money to the company's favorite charity, an organization that operates a summer camp for children with physical challenges. You wind up writing a lengthy posting packed with facts and heartwarming anecdotes about the camp and the children's experiences. When you must work that hard to persuade your audience to take an action such as donating money to a charity, aren't you being manipulative and unethical? Explain.

## Expand Your Skills

### Critique the Professionals

Visit the Facebook pages of six companies in several industries. How do the companies make use of their timeline? Do any of the companies use timeline posts to promote their products? Compare the material on the About tabs. Which company has the most compelling information here? How about the use of custom tabs; which company does the best job of using this Facebook feature? Using whatever medium your instructor requests, write a brief analysis of the message (no more than one page), citing specific elements from the piece and support from the chapter.

### Sharpen Your Career Skills Online

Bovée and Thill's Business Communication Web Search, at **http://websearch.businesscommunicationnetwork.com**, is a unique research tool designed specifically for business communication research. Use the Web Search function to find a website, video, PDF document, podcast, or presentation that offers advice on writing persuasive business messages or marketing and sales messages. Write a brief email message to your instructor or a post for your class blog, describing the item you found and summarizing the career skills information you learned from it.

# Cases

Website links for selected companies mentioned in cases can be found in the Student Assignments section at **http://real-timeupdates.com/bce7**.

### Writing Persuasive Business Messages

#### MICROBLOGGING SKILLS

**9-30. Message Strategies: Persuasive Business Messages [LO-3]** You've been trying for months to convince your boss, company CEO Will Florence, to start using Twitter. You've told him that top executives in numerous industries now use Twitter as a way to connect with customers and other stakeholders without going through the filters and barriers of formal corporate communications, but he doesn't see the value.

**Your task:** You come up with the brilliant plan to demonstrate Twitter's usefulness using Twitter itself. First, find three executives from three different companies who are on Twitter (choose any companies and executives you find interesting). Second, study their tweets to get a feel for the type of information they share. Third, if you don't already have a Twitter account set up for this class, set one up for the purposes of this exercise (you can deactivate later). Fourth, write four tweets to demonstrate the value of executive microblogging: one that summarizes the value of having a company CEO use Twitter and three support tweets, each one summarizing how your three real-life executive role models use Twitter.

#### EMAIL SKILLS

**9-31. Message Strategies: Persuasive Business Messages [LO-3]** As someone who came of age in the "post email" world of blogs, wikis, social networks, and other Web 2.0 technologies, you were rather disappointed to find your new employer solidly stuck in the age of email. You use email, of course, but it is only one of the tools in your communication toolbox. From your college years, you have hands-on experience with a wide range of social media tools, having used them to collaborate on school projects, to become involved in your local community, to learn more about various industries and professions, and to research potential employers during your job search. (In fact, without social media, you might never have heard about your current employer in the first place.) Moreover, your use of social media on the job has already paid several important dividends, including finding potential sales contacts at several large companies, connecting with peers in other companies to share ideas for working more efficiently, and learning about some upcoming legislative matters in your state that could profoundly hamper your company's current way of doing business.

You hoped that by setting an example through your own use of social media at work, your new colleagues and company management would quickly adopt these tools as well. However, just the opposite has happened. Waiting in your email in-box this morning was a message from the CEO, announcing that the company is now cutting off access to social networking websites and banning the use of any social media at work. The message says using company time and company computers for socializing is highly inappropriate and might be considered grounds for dismissal in the future if the problem gets out of hand.

**Your task:** You are stunned by the message. You fight the urge to fire off a hotly worded reply to straighten out the CEO's misperceptions. Instead, you wisely decide to send a message to your immediate superior first, explaining why you believe the new policy should be reversed. Using your boss's favorite medium (email, of course!), write a persuasive message, explaining why Facebook, Twitter, and other social networking technologies are valid—and valuable—business tools. Bolster your argument with examples from other companies and advice from communication experts.

## LETTER WRITING SKILLS

**9-32. Message Strategies: Persuasive Business Messages [LO-3]** The coffee shop across the street from your tiny apartment is your haven away from home—great beverages, healthy snacks, an atmosphere that is convivial but not so lively that you can't focus on homework, and free wireless. It lacks only one thing: some way to print out your homework and other files when you need hard copy. Your college's libraries and computer labs provide printers, but you live three miles from campus, and it's a long walk or an inconvenient bus ride.

**Your task:** Write a letter to the owner of the coffee shop, encouraging her to set up a printing service to complement the free wireless access. Propose that the service run at break-even prices, just enough to pay for paper, ink cartridges, and the cost of the printer itself. The benefit to the shop would be enticing patrons to spend more time—and therefore more of their coffee and tea money—in the shop. You might also mention that you had to take the bus to campus to print this letter, so you bought your afternoon latte somewhere else.

## BLOGGING SKILLS/TEAM SKILLS

**9-33. Message Strategies: Persuasive Business Messages [LO-3]** As a strong advocate for the use of social media in business, you are pleased by how quickly people in your company have taken up blogging, wiki writing, and other new-media activities. You are considerably less excited by the style and quality of what you see in the writing of your colleagues. Many seem to have interpreted "authentic and conversational" to mean "anything goes." Several Twitter users in the company seem to have abandoned any pretense of grammar and spelling. A few managers have dragged internal disagreements about company strategy out into public view, arguing with each other through comments on various industry-related forums. Production demonstration videos have been posted to the company's YouTube channel virtually unedited, making the whole firm look unpolished and unprofessional. The company CEO has written some blog posts that bash competitors with coarse and even crude language.

You pushed long and hard for greater use of these tools, so you feel a sense of responsibility for this situation. In addition, you are viewed by many in the company as the resident expert on social media, so you have some "expertise authority" on this issue. On the other hand, you are only a first-level manager, with three levels of managers above you, so while you have some "position authority" as well, you can hardly dictate best practices to the managers above you.

**Your task:** Working with two other students, write a post for the company's internal blog (which is not viewable outside the company), outlining your concerns about these communication practices. Use the examples mentioned above, and make up any additional details you need. Emphasize that although social media communication is often less formal and more flexible than traditional business communication, it shouldn't be unprofessional. You are thinking of proposing a social media training program for everyone in the company, but for this message you just want to bring attention to the problem.

## EMAIL SKILLS

**9-34. Message Strategies: Persuasive Business Messages [LO-3]** Whole Foods Market has grown into a nationwide chain by catering to consumer desires for healthier foods and environmentally sensitive farming methods. Along with selling these products, the company makes a commitment "to be active participants in our local communities." Whole Foods not only donates 5 percent of after-tax profits to not-for-profit organizations but also financially supports employees who volunteer their time for community service projects. Many Whole Foods stores donate food and household supplies to food banks in their local communities.

You are the manager of the Whole Foods Market on Ponce de Leon Avenue in Atlanta. You developed a program for donating surplus food to local food banks. Because of the success of that program, top executives have asked you to help other Whole Foods stores coordinate this effort into a chainwide food donation program, "Whole Foods for Life." Ideally, by streamlining the process chainwide, the company would be able to increase the number of people it helps and to get more of its employees involved.

You have a limited budget for the program, so the emphasis has to be on using resources already available to the stores and tapping into employees' creativity to come up with locally relevant ideas.[20]

**Your task:** Write a persuasive email message to all managers at Whole Foods Market, explaining the new program and requesting that they help by pooling ideas they've gleaned from their local experience. Even if they don't have food-donation programs currently in place, you want to hear ideas from them and their employees for this charitable project. With their help, you'll choose the best ideas to develop the new Whole Foods for Life program.

### EMAIL SKILLS

**9-35. Message Strategies: Requests for Action [LO-2]** Managing a new-product launch can be an aggravating experience as you try to coordinate a wide variety of activities and processes while barreling toward a deadline that is often defined more by external factors than a realistic assessment of whether you can actually meet it. You depend on lots of other people to meet their deadlines, and if they fail, you fail. The pressure is enough to push anybody over the edge. Unfortunately, that happened to you last week. After a barrage of bad news from suppliers and the members of the team you lead, you lost your cool in a checkpoint meeting. Shouting at people and accusing them of slacking off was embarrassing enough, but the situation got a hundred times worse this morning when your boss suggested you needed some low-pressure work for a while and removed you as the leader of the launch team.

**Your task:** Write an email message to your boss, Sunil, requesting to be reinstated as the project team leader. Make up any information you need.

### EMAIL SKILLS

**9-36. Message Strategies: Requests for Action [LO-2]** You appreciate how important phones are to your company's operations, but the amount of conversational chatter in your work area has gotten so bad that it's hard to concentrate on your work. You desperately need at least a few quiet hours every day to engage in the analytical thinking your job requires.

**Your task:** Write an email message to the division vice president, Jeri Ross, asking her to designate one of the conference rooms as a quiet-zone work room. It would have WiFi so that employees can stay connected to the corporate network, but it would not have any phone service, either landline or mobile. (Mobile reception is already weak in the conference rooms, but you will propose to equip the room with a mobile signal jammer to ensure that no calls can be made or received.) In addition, conversation of any kind would be strictly forbidden. Make up any details you need.

### EMAIL SKILLS/ MOBILE SKILLS

**9-37. Message Strategies: Persuasive Business Messages [LO-3]** Your new company, WorldConnect Language Services, started well and is going strong. However, to expand beyond your Memphis, Tennessee, home market, you need a one-time infusion of cash to open branch offices in other cities around the Southeast. At the Entrepreneur's Lunch Forum you attended yesterday, you learned about several angels, as they are called in the investment community—private individuals who invest money in small companies in exchange for a share of ownership. One such angel, Melinda Sparks, told the audience she is looking for investment opportunities outside high technology, where angels often invest their money. She also indicated that she looks for entrepreneurs who know their industries and markets well, who are passionate about the value they bring to the marketplace, who are committed to growing their businesses, and who have a solid plan for how they will spend an investor's money. Fortunately, you meet all of her criteria.

**Your task:** Draft an email message to Sparks, introducing yourself and your business and asking for a meeting at which you can present your business plan in more detail. Explain that your Memphis office was booked to capacity within two months of opening, thanks to the growing number of international business professionals looking for translators and interpreters. You've researched the entire Southeast region and identified at least 10 other cities that could support language services offices such as yours. Making up whatever other information you need, draft a four-paragraph message following the AIDA model, ending with a request for a meeting within the next four weeks. You know Sparks tends to read email on her phone, so craft your message to be mobile-friendly.

### EMAIL SKILLS

**9-38. Message Strategies: Requests for Information [LO-2]** As a motivated, ambitious employee, you naturally care about your performance on the job—and about making sure your performance is being fairly judged and rewarded. Unfortunately, the company has gone through a period of turmoil over the past several years, and you have reported to seven managers during the past five years. One year, your annual performance review was done by someone who had been your boss for only three weeks and knew almost nothing about you or your work. Last year, your boss was fired the day after he wrote your review, and you can't help but wonder whether you got a fair review from someone in that situation. Overall, you are worried that your career progression and wage increases have been hampered by inconsistent and ill-informed performance reviews.

The company allows employees to keep copies of their reviews, but you haven't been diligent about doing so. You would like to get copies of your last five reviews, but you heard from a colleague that the human resources department will not release copies of past reviews without approval from the managers who wrote them. In your case, however, three of the managers who reviewed you are no longer with the company, and you do not want your current boss to know you are concerned about your reviews.

**Your task:** Write an email message to the director of human resources, Leon Sandes, requesting copies of your performance reviews over the past five years. Use the information included above and make up any additional details you need.

## Writing Marketing and Sales Messages

### LETTER WRITING SKILLS/ PORTFOLIO BUILDER

**9-39. Message Strategies: Marketing and Sales Messages [LO-4]** Water polo is an active sport that provides great opportunities for exercise and for learning the collaborative skills involved in teamwork. You can learn more at the USA Water Polo website.

**Your task:** Write a one-page letter to parents of 10- to 14-year-old boys and girls, promoting the health and socialization benefits of water polo and encouraging them to introduce their children to the sport through a local club. Tell them they can learn more about the sport and find a club in their area by visiting the USA Water Polo website.

## WEB WRITING SKILLS/TEAM SKILLS/ PORTFOLIO BUILDER

**9-40. Message Strategies: Marketing and Sales Messages [LO-4]** You never intended to become an inventor, but you saw a way to make something work more easily, so you set to work. You developed a model, found a way to mass-produce it, and set up a small manufacturing studio in your home. You know that other people are going to benefit from your invention. Now all you need to do is reach that market.

**Your task:** Team up with other students assigned by your instructor and imagine a useful product that you might have invented—perhaps something related to a hobby or sporting activity. List the features and benefits of your imaginary product, and describe how it helps customers. Then write the copy for a webpage that would introduce and promote this product, using what you've learned in this chapter and making up details as you need them. As your instructor indicates, submit the copy as a word processor file or as a webpage using basic HTML formatting.

## WEB WRITING SKILLS

**9-41. Message Strategies: Marketing and Sales Messages [LO-4]** Convincing people to give their music a try is one of the toughest challenges new bands and performers face.

**Your task:** Imagine you've taken on the job of promoting an amazing new band or performer you just discovered. Choose someone you've heard live or online and write 100 to 200 words of webpage copy describing the music in a way that will convince people to listen to a few online samples.

## SOCIAL NETWORKING SKILLS

**9-42. Message Strategies: Marketing and Sales Messages; Media Skills: Social Networking [LO-4], Chapter 6** Curves is a fitness center franchise that caters to women who may not feel at home in traditional gyms. With its customer-focused and research-based approach, Curves has become a significant force in the fitness industry and one of the most successful franchise operations in history.[21]

**Your task:** Read the Overview and History sections at the Curves website. Imagine that you are adapting this material for the Info tab on the company's Facebook page. Write a "Company Overview" (95–100 words) and a "Mission" statement (45–50 words).

## SOCIAL NETWORKING SKILLS/ TEAMWORK SKILLS

**9-43. Message Strategies: Marketing and Sales Messages; Media Skills: Social Networking [LO-4], Chapter 6** You chose your college or university based on certain expectations, and you've been enrolled long enough now to have some idea about whether those expectations have been met. In other words, you are something of an expert about the "consumer benefits" your school can offer prospective students.

**Your task:** In a team of four students, interview six other students who are not taking this business communication course. Try to get a broad demographic and psychographic sample, including students in a variety of majors and programs. Ask these students (1) why they chose this college or university and (2) whether the experience has met their expectations so far. To ensure the privacy of your respondents, do not record their names with their answers. Each member of the team should then answer these same two questions, so that you have responses from a total of ten students.

After compiling the responses (you might use Google Docs or a similar collaboration tool so that everyone on the team has easy access to the information), analyze them as a team to look for any recurring "benefit themes." Is it the quality of the education? Research opportunities? Location? The camaraderie of school sporting events? The chance to meet and study with fascinating students from a variety of backgrounds? Identify two or three strong benefits that your college or university can promise—and deliver—to prospective students.

Now nominate one member of the team to draft a short marketing message that could be posted on the Notes tab of your school's Facebook page. The message should include a catchy title that makes it clear the message is a student's perspective on why this is a great place to get a college education. When the draft is ready, the other members of the team should review it individually. Finally, meet as a team to complete the message.

## MICROBLOGGING SKILLS

**9-44. Message Strategies: Marketing and Sales Messages; Media Skills: Microblogging [LO-4], Chapter 6** Effective microblogging messages emphasize clarity and conciseness—and so do effective sales messages.

**Your task:** Find the website of any product that can be ordered online (any product you find interesting and that is appropriate to use for a class assignment). Adapt the information on the website, using your own words, and write four tweets to promote the product. The first should get your audience's attention (with an intriguing benefit claim, for example), the second should build audience interest by providing some support for the claim you made in the first message, the third should increase readers' desire to have the product by layering on one or two more buyer benefits, and the fourth should motivate readers to take action to place an order. Your first three tweets can be up to 140 characters, but the fourth should be limited to 120 to accommodate a URL (you don't need to include the URL in your message, however).

If your class is set up with private Twitter accounts, use your private account to send your messages. Otherwise, email your four messages to your instructor or post them on your class blog, as your instructor directs.

# Improve Your Grammar, Mechanics, and Usage

You can download the text of this assignment from http://real-timeupdates.com/bce7; click on Student Assignments and then click on Chapter 9. Improve Your Grammar, Mechanics, and Usage.

### Level 1: Self-Assessment—Commas

Review Section 2.6 in the Handbook of Grammar, Mechanics, and Usage, and then complete the following 15 items.

For the following items, insert required commas.

**9-45.** Please send us four cases of filters two cases of wing nuts and a bale of rags.
**9-46.** Your analysis however does not account for returns.
**9-47.** As a matter of fact she has seen the figures.
**9-48.** Before May 7 1999 they wouldn't have minded either.
**9-49.** After Martha has gone talk to me about promoting her.
**9-50.** Stoneridge Inc. will go public on September 9 2014.
**9-51.** We want the new copier not the old model.
**9-52.** "Talk to me" Sandra said "before you change a thing."
**9-53.** Because of a previous engagement Dr. Stoeve will not be able to attend.
**9-54.** The company started attracting attention during the long hard recession of the mid-1970s.
**9-55.** You can reach me at this address: 717 Darby Place Scottsdale Arizona 85251.
**9-56.** Transfer the documents from Fargo North Dakota to Boise Idaho.
**9-57.** Sam O'Neill the designated representative is gone today.
**9-58.** With your help we will soon begin.
**9-59.** She may hire two new representatives or she may postpone filling those territories until spring.

### Level 2: Workplace Applications

The following items may contain errors in grammar, capitalization, punctuation, abbreviation, number style, word division, and vocabulary. Rewrite each sentence, correcting all errors. If a sentence has no errors, write "Correct" for that number.

**9-60.** A pitfall of internal promotions is, that a person may be given a job beyond their competence.
**9-61.** What makes this development possible is the technological advances in todays workplace.
**9-62.** We have up to date physical safeguards, such as secure areas in buildings, electronic safeguards, such as passwords and encryption, and we have procedural safeguards, such as customer authentication procedures.
**9-63.** When asked why BASF needs to bring in a consultant after so many years, process development quality assurance manager Merritt Sink says that experience is extremely important on these type of projects.
**9-64.** Looking at just one growth indicator imports to the United States from China "ballooned" to $102 billion in 2005; compared with 15 billion in 1994.
**9-65.** Levi Strauss was the first major manufacturer to develop and do publicity about a formal Code of Conduct for it's contract manufacturers.
**9-66.** In some other countries, while the local labor laws may be comparable or even more stringent than in the United States, law enforcement mechanisms are weak or non-existent often.
**9-67.** Motor Co., South Koreas' largest-automotive producer are building a $1 billion assembly and manufacturing plant in Montgomery, Alabama.
**9-68.** The long term success of some Internet products rest heavily on broadbands wide acceptance.
**9-69.** Being creative, flexibility, and dynamic planning are the critical elements of any successful, manufacturing process.
**9-70.** "Starbucks expanded the Frappuccino family to satisfy customers by offering a broader array of blended beverages," said Howard Behar, Starbucks president, North American Operations.
**9-71.** Internationally-renowned interior designer, Jacques Garcia will be designing the hotel's interiors; the gardens will also be designed by him.
**9-72.** Anyone who thinks they know what a CEO does is probably wrong, according to Eric Kriss; a professional Chief Executive.
**9-73.** Doctor Ichak Adizes, who founded the Adizes institute, headquartered in Santa Barbara, Calif. has spent decade's studying the life cycle of businesses.
**9-74.** The best job-description in the world wont provide you with a trusted executive, finely-honed interviewing skills only will help one do that.

### Level 3: Document Critique

The following document may contain errors in grammar, capitalization, punctuation, abbreviation, number style, word division, and vocabulary. As your instructor indicates, photocopy this page and correct all errors using standard proofreading marks (see Appendix C) or download the document and make the corrections in your word-processing software.

Dear potential buyers:

You will be able to compare prices from more than three hundredinsurance companies'. Or find the lower rates for any insurance, such as Term life Automobile; Medical. dental. "No-exam" whole life, workers' compensation, Medicare supplements; Fixed annuities

$500 Dollar Guaranttes

We'll find you the lowest U.S. rates for term life insurance, or we'll deliver $500 to you overnight. Plus, every quote will carry a $five hundred dollar guarrantee of uptotheday accurracy.

"Insure.com provides rock-bottom quotes."—Forbes

All quotes are free and accurrate; We offer Lightning-Fast Service

What their saying about us can be found at www.insure.com. Our speedy service is being talked about by everyone, which has received high ratings and postive reviews from every major business publication "Nation's Business" "Kiplinger's Personal Finance" Good Housekeeping, The Los Angeles Times, "Money" "U.S. News & World Report"

Expert AdviSe Will be provided with No Sales Pitch:

You will not be dealing with insurance agents to save you time and money. But if you want advise our saleried insurance experts are available at our toll-free customer service number. We hope you will take a moment to peruse our webstie, www.insure.com today if possible.

Very truly yours,
Sasha Morgenstern

MyBCommLab

Go to **mybcommlab.com** for the following Assisted-graded writing questions:

**9-75.** What role do demographics and psychographics play in audience analysis during the planning of a persuasive message?

**9-76.** What role do champions have in social media marketing?

## Endnotes


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PART 4

# Longer Business Messages



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# 10 Understanding and Planning Reports and Proposals

## LEARNING OBJECTIVES

After studying this chapter, you will be able to

1. Adapt the three-step writing process to reports and proposals
2. Describe an effective process for conducting business research, explain how to evaluate the credibility of an information source, and identify the five ways to use research results
3. Explain the role of secondary research, and describe the two major categories of online research tools
4. Explain the role of primary research, and identify the two most common forms of primary research for business communication purposes
5. Explain how to plan informational reports and website content
6. Identify the three most common ways to organize analytical reports
7. Explain how to plan proposals



## Communication Matters . . .

"We are on your side. So please help us get to know you better by telling your story clearly and concisely."[1]
—from Garage Technology Ventures, a noted Silicon Valley venture capital firm

The venture capitalists at Garage Technology Venture emphasize an often-overlooked point when it comes to report writing and business communication in general: Your readers want you to succeed, because it's a win-win scenario. They get the information they need, and you communicate the message you want to share. When you're writing a request for venture capital as part of an entrepreneurial business plan or preparing any other kind of business report, follow the steps in this chapter to create win-win reports of your own.

ZUMA Press, Inc./Alamy

Noted entrepreneur, venture capitalist, and author Guy Kawasaki, one of the founders of Garage Technology Ventures, encourages report writers to tell their stories clearly and concisely.

# Applying the Three-Step Writing Process to Reports and Proposals

1 LEARNING OBJECTIVE
Adapt the three-step writing process to reports and proposals.

In previous chapters, you learned to use the three-step writing process for developing shorter business messages; now it's time to apply those skills to longer messages such as business plans. Reports fall into three basic categories (see Figure 10.1):

Reports can be classified as informational reports, analytical reports, and proposals.

- **Informational reports** offer data, facts, feedback, and other types of information, without analysis or recommendations.
- **Analytical reports** offer both information and analysis and can also include recommendations.
- **Proposals** present persuasive recommendations to internal or external audiences, often involving investments or purchases.

Reports can be a lot of work, but they also give you the opportunity to demonstrate your grasp of important business issues.

Try to view every business report as an opportunity to demonstrate your understanding of your audience's challenges and your ability to contribute to your organization's success. The three-step process is easily adapted to reports and, in fact, makes these larger projects easier to produce by ensuring a methodical, efficient approach to planning, writing, and completing.

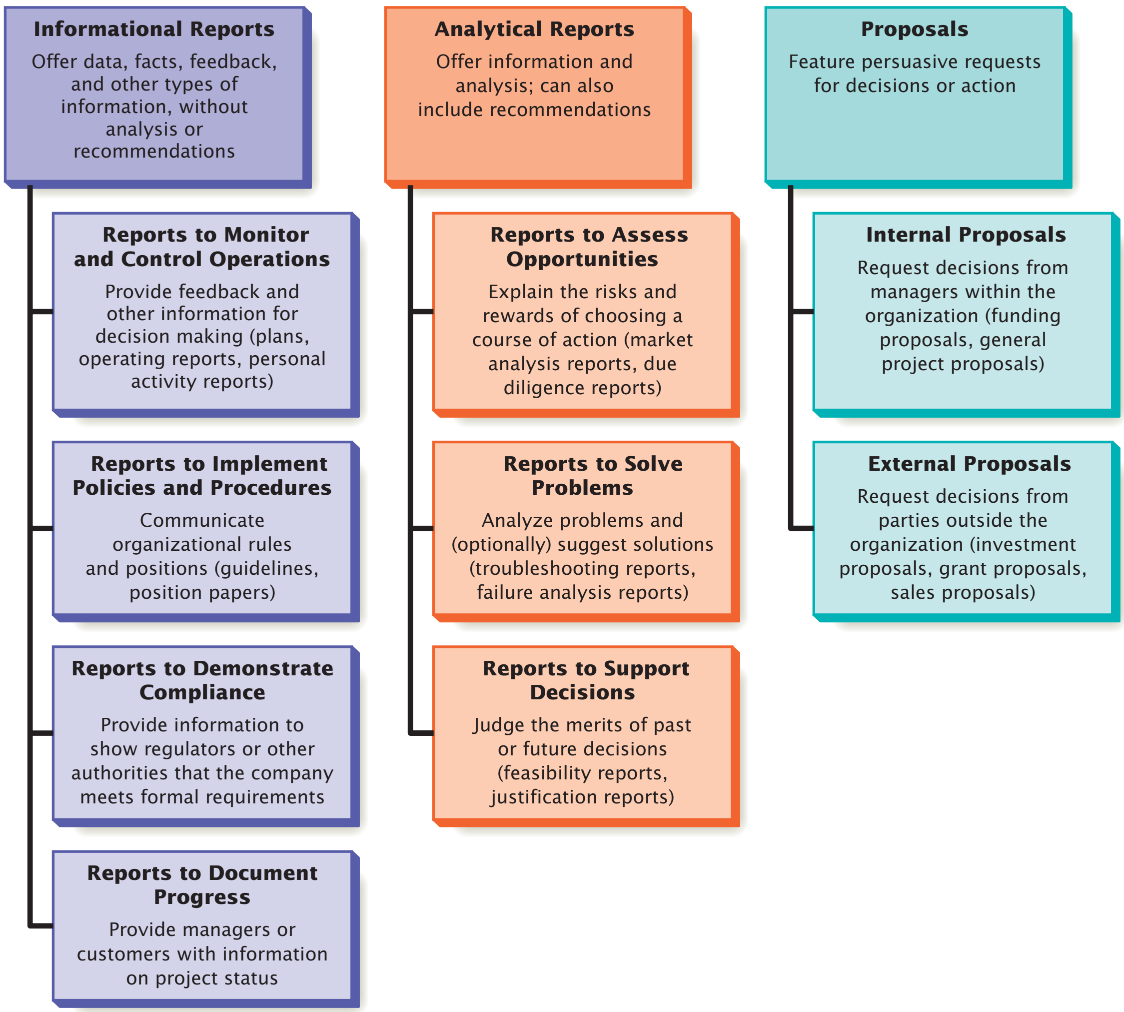


**Figure 10.1 Common Business Reports and Proposals**
You will have the opportunity to read and write many types of reports in your career; here are some of the most common.

## ANALYZING THE SITUATION

Reports can be complex, time-consuming projects, so be sure to analyze the situation carefully before you begin to write. Pay special attention to your **statement of purpose**, which explains *why* you are preparing the report and *what* you plan to deliver.

Define your purpose clearly so you don't waste time with unnecessary rework.

The most useful way to phrase your purpose statement is to begin with an infinitive phrase (*to* plus a verb), which helps pin down your general goal (*to inform*, *to identify*, *to analyze*, and so on). For instance, in an informational report, your statement of purpose can be as simple as one of these:

To identify potential markets for our new phone-based video games
To update the board of directors on the progress of the research project
To submit required information to the Securities and Exchange Commission

The statement of purpose for an analytical report often needs to be more comprehensive. For example, if you were asked to find ways of reducing employee travel and entertainment (T&E) costs, you might phrase your statement of purpose like this:

To analyze the T&E budget, evaluate the impact of recent changes in airfares and hotel costs, and suggest ways to tighten management's control over T&E expenses

A proposal must also be guided by a clear statement of purpose to help you focus on crafting a persuasive message. Here are several examples:

The statement of purpose for a proposal should help guide you in developing a persuasive message.

To secure funding in next year's budget for new conveyor systems in the warehouse
To get management approval to reorganize the North American salesforce
To secure $2 million from outside investors to start production of the new titanium mountain bike

In addition to considering your purpose carefully, you will want to prepare a **work plan** for most reports and proposals in order to make the best use of your time. For simpler reports, the work plan can be an informal list of tasks and a simple schedule. However, if you're preparing a lengthy report, particularly when you're collaborating with others, you'll want to develop a more detailed work plan (see Figure 10.2 on the next page).

A detailed work plan saves time and often produces more effective reports.

## GATHERING INFORMATION

Obtaining the information needed for many reports and proposals requires careful planning, and you may even need to do a separate research project just to acquire the data and information you need. To stay on schedule and on budget, be sure to review both your statement of purpose and your audience's needs so that you can prioritize your information needs and focus on the most important questions.

Some reports require formal research projects in order to gather all the necessary information.

**MOBILE APPS**
Instapaper's mobile app lets you instantly save web pages and articles to read later, a convenient capability when you're exploring a topic and want to collect potential sources for review.

## SELECTING THE RIGHT COMBINATION OF MEDIA AND CHANNELS

In addition to the general media and channel selection criteria discussed in Chapter 3, consider several points for reports and proposals. First, for many reports and proposals, audiences have specific media requirements, and you might not have a choice. For instance, executives in many corporations now expect to review many reports via their in-house intranets, sometimes in conjunction with an **executive dashboard**, a customized graphical presentation of key performance parameters (see Figure 10.3 on page 285). Second, consider how your audience members want to provide feedback on your report or proposal. Do they prefer to write comments on a printed document or edit a wiki article? Third, will people need to be able to search through your document or update it in the future? Fourth, bear in mind that your choice of medium and channel sends a message. For instance, a routine sales report dressed up in expensive multimedia will look like a waste of valuable company resources.

When choosing the medium for a report, think carefully about how your audience might want to use your report.

The problem statement clearly and succinctly defines the problem the writers intend to address.

STATEMENT OF THE PROBLEM
The rapid growth of our company over the past five years has reduced the sense of community among our staff. People no longer feel like part of an intimate organization that values teamwork.

This paragraph identifies exactly what will be covered by the research and addressed in the final report.

PURPOSE AND SCOPE OF WORK
The purpose of this study is to determine whether social networking technology such as Facebook and Socialtext would help rebuild a sense of community within the workforce and whether encouraging the use of such tools in the workplace will have any negative consequences. The study will attempt to assess the impact of social networks in other companies in terms of community-building, morale, project communication, and overall productivity.

This section explains how the researchers will find the data and information they need.

SOURCES AND METHODS OF DATA COLLECTION
Data collection will start with secondary research, including a review of recently published articles and studies on the use of social networking in business and a review of product information published by technology vendors. Primary research will focus on an employee and management survey to uncover attitudes about social networking tools. We will also collect anecdotal evidence from bloggers and others with experience using networks in the workplace.

The preliminary outline has enough detail to guide the research and set reader expectations.

PRELIMINARY OUTLINE
The preliminary outline for this study is as follows:

I. What experiences have other companies had with social networks in the workplace?
   A. Do social networks have a demonstrable business benefit?
   B. How do employees benefit from using these tools?
   C. Has network security and information confidentiality been an issue?
II. Is social networking an appropriate solution for our community-building needs?
   A. Is social networking better than other tools and methods for community building?
   B. Are employees already using social networking tools on the job?
   C. Will a company-endorsed system distract employees from essential duties?
   D. Will a company system add to managerial workloads in any way?
III. If we move ahead, should we use a "business-class" network such as Socialtext or a consumer tool such as Facebook?
   A. How do the initial and ongoing costs compare?
   B. Do the additional capabilities of a business-class network justify the higher costs?
IV. How should we implement a social network?
   A. Should we let it grow "organically," with employees choosing their own tools and groups?
   B. Should we make a variety of tools available and let employees improvise on their own?
   C. Should we designate one system as the official company social network and make it a permanent, supported element of the information technology infrastructure?
V. How can we evaluate the success of a new social network?
   A. What are the criteria of success or failure?
   B. What is the best way to measure these criteria?

MyBCommLab Apply Figure 10.2's key concepts by going to **mybcommlab.com**

The assignments and schedule section clearly lists responsibilities and due dates.

TASK ASSIGNMENTS AND SCHEDULE
Each phase of this study will be completed by the following dates:

| | |
|---|---|
| Secondary research: Hank Waters | September 15, 2015 |
| Employee and management survey: Julienne Cho | September 22, 2015 |
| Analysis and synthesis of research: Hank Waters/Julienne Cho | October 6, 2015 |
| Comparison of business and consumer solutions: Julienne Cho | October 13, 2015 |
| Comparison of implementation strategies: Hank Waters | October 13, 2015 |
| Final report: Hank Waters | October 20, 2015 |

**Figure 10.2 Work Plan for a Report**
A formal work plan such as this is a vital tool for planning and managing complex writing projects. The preliminary outline here helps guide the research; the report writers may well modify the outline when they begin writing the report.

## ORGANIZING YOUR INFORMATION

When your audience is likely to be receptive or at least open-minded, use the direct approach; if readers are skeptical about you or your report's main idea, use the indirect approach.

The direct approach is often used for reports because it is efficient and easy to follow (see Figure 10.4 on page 286). When your audience is likely to be receptive or at least open-minded, use the direct approach: Lead with a summary of your key findings, conclusions, recommendations, or proposal, whichever is relevant. This "up-front" arrangement saves time and makes the rest of the report easier to follow. For those readers who have questions or want more information, later parts of the report provide complete findings and supporting details.

However, if the audience is unsure about your credibility or is not ready to accept your main idea without first seeing some reasoning or evidence, the indirect approach is a better

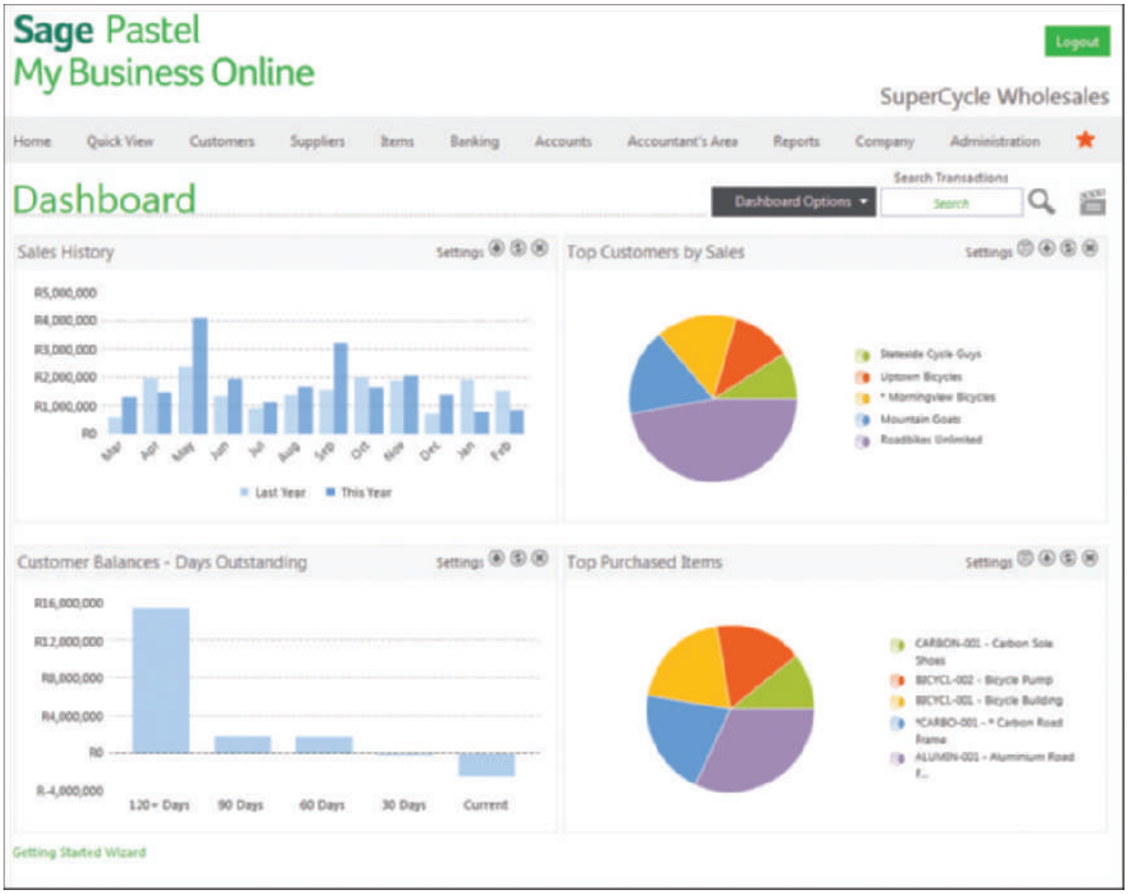


**Figure 10.3** **Executive Dashboards**
Executive dashboards are super-summarized operating reports that present key business figures in graphical format.

choice because it gives you a chance to prove your points and gradually overcome audience reservations. To enable the use of AIDA-style persuasion, unsolicited proposals in particular often use the indirect approach. Bear in mind, though, that the longer the document, the less effective the indirect approach is likely to be.

## Supporting Your Messages with Reliable Information

Effective research involves a lot more than simply typing a few terms into a search engine. Save time and get better results by using a clear process:

1. **Plan your research.** Planning is the most important step of any research project; a solid plan yields better results in less time.
2. **Locate the data and information you need.** Your next step is to figure out *where* the data and information are and *how* to access them.
3. **Process the data and information you located.** The data and information you find probably won't be in a form you can use immediately and may require statistical analysis or other processing.
4. **Apply your findings.** You can apply your research findings in three ways: summarizing information, drawing conclusions, and developing recommendations.
5. **Manage information efficiently.** Many companies are trying to maximize the return on the time and money invested in business research by collecting and sharing research results in a variety of computer-based systems, known generally as **knowledge management systems**.

2 LEARNING OBJECTIVE
Describe an effective process for conducting business research, explain how to evaluate the credibility of an information source, and identify the five ways to use research results.

Researching without a plan wastes time and usually produces unsatisfactory results.

DIRECT APPROACH

Since the company's founding 25 years ago, we have provided regular repair service for all our electric appliances. This service has been an important selling point as well as a source of pride for our employees. However, rising labor costs have made it impossible to maintain profitability while offering competitive service rates. Last year, we lost $500,000 on our repair business.

Summarizes the situation

Immediately introduces one of the report's major conclusions

Because of your concern over these losses, you asked me to study whether we should discontinue our repair service. After analyzing the situation in depth, I have concluded that the repair service is an expensive, impractical tradition, and I recommend that the service be discontinued.

Reminds the audience why the report was prepared

Presents the report's key recommendation, that the repair service should be discontinued

By withdrawing from the electric appliance repair business, we can substantially improve our financial performance without damaging our reputation with customers. This conclusion is based on three basic points that are covered in the following pages:

Emphasizes the benefits of acting on the recommendation and addresses any fears about possible negative consequences

- It is highly unlikely that we will ever be able to make a profit in the repair business.
- We can refer customers to a variety of qualified repair firms without significantly reducing customer satisfaction.
- Closing down the service operation will create few internal problems.

Lists three important conclusions that led to the recommendation to end the service (notice how the indirect approach that follows presents these same three points as questions to be considered)

INDIRECT APPROACH

Summarizes the situation

Since the company's founding 25 years ago, we have provided regular repair service for all our electric appliances. This service has been an important selling point as well as a source of pride for our employees. However, rising labor costs have made it impossible to maintain profitability while offering competitive service rates.

Reminds the audience why the report was prepared

Indicates that conclusions and recommendations will be presented later in the report

Because of your concern over these losses, you have asked me to study whether we should discontinue our repair service. I have analyzed the situation in depth, and the following pages present my findings and recommendations for your review. The analysis addressed three basic questions:

Introduces the three points that will eventually lead to the conclusions and ultimately to the recommendation

- What is the extent of our losses, and what can we do to turn the business around?
- Would withdrawal hurt our sales of electrical appliances?
- What would be the internal repercussions of closing down the repair business?

**Figure 10.4 Direct Approach Versus Indirect Approach in an Introduction**
In the direct version of this introduction, the writer quickly presents the report's recommendation, followed by the conclusions that led to that recommendation. In the indirect version, the same topics are introduced in the same order, but no conclusions are drawn about them; the conclusions and the ultimate recommendation appear later, in the body of the report.

MyBCommLab Apply Figure 10.4's key concepts by going to **mybcommlab.com**

## PLANNING YOUR RESEARCH

The problem statement guides your research by focusing on the decision you need to make or the conclusion you need to reach.

Start by developing a **problem statement** that defines the purpose of your research—the decision you need to make or the conclusion you need to reach at the end of the process. Next, identify the information you need in order to make that decision or reach that conclusion. You can then begin to generate the questions that will constitute your research. Chances are you will have more questions than you have time or money to answer, so prioritize your information needs.

Before beginning any research project, remember that research carries some significant ethical responsibilities. Your research tactics affect the people you gather data and information from, the people who read your results, and the people who are affected by the way you present those results. To avoid ethical lapses, follow these guidelines:

- Keep an open mind so that you don't skew the research toward answers you want or expect to see.
- Respect the privacy of your research participants, and don't mislead people about the purposes of your research.[2]
- Document sources and give appropriate credit.

- Respect your sources' *intellectual property rights* (the ownership of unique ideas that have commercial value in the marketplace).[3]
- Don't distort information from your sources.
- Don't misrepresent who you are or what you intend to do with the research results.

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In addition to ethics, research etiquette deserves careful attention. For example, respect the time of anyone who agrees to be interviewed or to be a research participant, and maintain courtesy throughout the interview or research process.

## LOCATING DATA AND INFORMATION

The range of sources available to business researchers today can be overwhelming. The good news is that if you have a question about an industry, a company, a market, a new technology, or a financial topic, somebody else has probably already researched the subject. Research done previously for another purpose is considered **secondary research**; sources for such research information include magazines, newspapers, public websites, books, and other reports. Don't let the name *secondary* fool you, though. You want to start with secondary research because it can save you considerable time and money for many projects. In contrast, **primary research** involves the collection of new data through surveys, interviews, and other techniques.

Primary research gathers information that you gather specifically for a new research project; secondary research gathers information that others have gathered (and published, in many cases).

## EVALUATING INFORMATION SOURCES

No matter where you're searching, it is your responsibility to separate quality information from unreliable junk, so you don't taint your results or damage your reputation. Social media tools have complicated this challenge by making many new sources of information available. On the positive side, independent sources communicating through blogs, Twitter and other microblogging sites, wikis, user-generated content sites, and podcasting channels can provide valuable and unique insights, often from experts whose voices might never be heard otherwise. On the negative side, these nontraditional information sources often lack the editorial boards and fact checkers commonly used in traditional publishing. You cannot assume that the information you find in blogs and other sources is accurate, objective, and current. Answer the following questions about each piece of material:

Evaluate your sources carefully to avoid embarrassing and potentially damaging mistakes.

- **Does the source have a reputation for honesty and reliability?** For example, try to find out how the source accepts articles and whether it has an editorial board, conducts peer reviews, or follows fact-checking procedures.
- **Is the source potentially biased?** To interpret an organization's information, you need to know its point of view.
- **What is the purpose of the material?** For instance, was the material designed to inform others of new research, to advance a political position, or to promote a product?
- **Is the author credible?** Is the author a professional journalist or merely someone with an opinion?
- **Where did the source get *its* information?** Try to find out who collected the data and the methods used.
- **Can you verify the material independently?** Verification is particularly important when the information goes beyond simple facts to include projections, interpretations, and estimates.
- **Is the material current and complete?** Make sure you are using the most current information available. Have you accessed the entire document or only a selection from it?
- **Does the information make sense?** Step back and determine whether the information stands up to logical scrutiny.

You probably won't have time to conduct a thorough background check on all your sources, so focus your efforts on the most important or most suspicious pieces of information. And if you can't verify critical facts or figures, be sure to let your readers know that.

## USING YOUR RESEARCH RESULTS

After you collect data and information, the next step is converting it into usable content.

After you've collected your data and information, the next step is to transform this raw material into the specific content you need. This step can involve quoting, paraphrasing, or summarizing textual material; drawing conclusions; and making recommendations.

### Quoting, Paraphrasing, and Summarizing Information

Quoting a source means reproducing the content exactly and indicating who created the information originally.

You can use textual information from secondary sources in three ways. *Quoting* a source means you reproduce the material exactly as you found it (giving full credit to the source, of course). Use direct quotations when the original language will enhance your argument or when rewording the passage would reduce its impact. However, be careful with direct quotes: Using too many creates a choppy patchwork of varying styles and gives the impression that all you've done is piece together the work of other people. When quoting sources, set off shorter passages with quotation marks and set off longer passages (generally, five lines or more) as separate, indented paragraphs.

Paraphrasing is expressing someone else's ideas in your own words.

You can often maximize the impact of secondary material in your own writing by *paraphrasing* it: restating it in your own words and with your own sentence structures.[4] Paraphrasing helps you maintain consistent tone while using vocabulary that's familiar to your audience. Of course, you still need to credit the originator of the information, but you don't need quotation marks or indented paragraphs.

Summarizing is similar to paraphrasing but distills the content into fewer words.

*Summarizing* is similar to paraphrasing but presents the gist of the material in fewer words than the original by leaving out details, examples, and less important information (see Figure 10.5). Like quotations and paraphrases, summaries also require complete documentation of sources. Summarizing is not always a simple task, and your audience will judge your ability to separate significant issues from less significant details.

Of course, all three approaches require careful attention to ethics. When quoting directly, take care not to distort the original intent of the material by quoting selectively or out of context. And never resort to **plagiarism**—presenting someone else's words as your own, such as copying material from an online source and dropping it into a report without giving proper credit.

### Drawing Conclusions

A **conclusion** is a logical interpretation of facts and other information. In addition to being logically sound, a conclusion should be based only on the information provided or at least

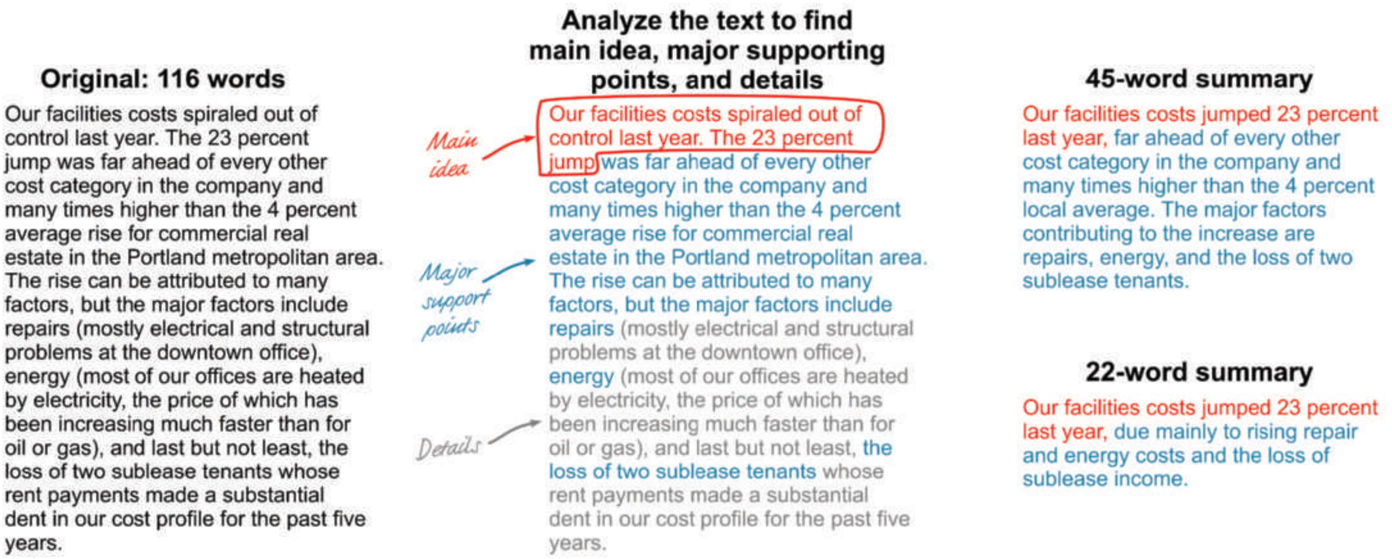


**Figure 10.5** **Summarizing Effectively**
To summarize a section of text, first analyze it to find the main idea, the major support points, and the less-important details. Then assemble the appropriate pieces with additional words and phrases as needed to ensure a smooth flow.

referred to in the report. Reaching good conclusions is one of the most important skills you can develop in your business career. In fact, the ability to see patterns and possibilities that others can't is one of the hallmarks of innovative business leaders.

### Making Recommendations

Whereas a conclusion interprets information, a **recommendation** suggests what to do about the information. The following example shows the difference between a conclusion and a recommendation:

| Conclusion | Recommendation |
| --- | --- |
| On the basis of its track record and current price, I believe that this company is an attractive buy. | I recommend that we offer to buy the company at a 10 percent premium over the current market value of its stock. |

To be credible, recommendations must be practical and based on sound logical analysis. Also, when making a recommendation, be certain you have adequately described the recommended course of action so that readers aren't left wondering what happens next.

# Conducting Secondary Research

Even if you intend to eventually conduct primary research, start with a review of any available secondary research. Inside your company, you might be able to find a variety of helpful reports and other documents. Outside the company, business researchers can choose from a wide range of print and online resources, both in libraries and online.

**3 LEARNING OBJECTIVE** Explain the role of secondary research, and describe the two major categories of online research tools.

## FINDING INFORMATION AT A LIBRARY

You'll want to start most research projects by conducting secondary research first.

Libraries offer information and resources you can't find anywhere else—including experienced research librarians.

Public, corporate, and university libraries offer printed sources with information that is not available online and online sources that are available only by subscription. Libraries are also where you'll find one of your most important resources: librarians. Reference librarians are trained in research techniques and can often help you find obscure information you can't find on your own. They can also direct you to the typical library's many sources of business information:

- **Newspapers and periodicals.** Libraries offer access to a wide variety of popular magazines, general business magazines, *trade journals* (which provide information about specific professions and industries), and *academic journals* (which provide research-oriented articles from researchers and educators).
- **Business books.** Although less timely than newspapers, periodicals, and online sources, business books provide in-depth coverage and analysis that often can't be found anywhere else.
- **Directories.** Thousands of directories are published in print and digital formats in the United States, and many include membership information for all kinds of professions, industries, and special-interest groups.
- **Almanacs and statistical resources.** Almanacs are handy guides to factual and statistical information about countries, politics, the labor force, and so on. One of the most extensive is the *Statistical Abstract of the United States* (available online and in print).
- **Government publications.** Information on laws, court decisions, tax questions, regulatory issues, and other governmental concerns can often be found in collections of government documents.
- **Databases.** Databases offer vast collections of computer-searchable information, often in specific areas such as business, law, science, technology, and education. Some of these are available only by institutional subscription, so the library may be your only way to gain access to them. Some libraries offer remote online access to some or all databases; for others, you'll need to visit in person.

Local, state, and federal government agencies publish a huge array of information that is helpful to business researchers.

## FINDING INFORMATION ONLINE

Internet research tools fall into two basic categories: search tools and monitoring tools.

The Internet can be a tremendous source of business information, provided you know where to look and how to use the tools available. Roughly speaking, the tools fall into two categories: those you can use to actively *search* for existing information and those you can use to *monitor* selected sources for new information. (Some tools can perform both functions.)

### Online Search Tools

General-purpose search engines are tremendously powerful tools, but they have several shortcomings you need to consider.

The most familiar search tools are general-purpose **search engines**, such as Google and Bing, which scan millions of websites to identify individual webpages that contain a specific word or phrase and then attempt to rank the results from most useful to least useful. Website owners use *search engine optimization* techniques to help boost their rankings in the results, but the ranking algorithms are kept secret to prevent unfair manipulation of the results.

For all their ease and power, conventional search engines have three primary shortcomings: (1) no human editors are involved to evaluate the quality or ranking of the search results; (2) various engines use different search techniques, so they often find different material; and (3) search engines can't reach all the content on some websites (this part of the Internet is sometimes called the *hidden Internet* or the *deep Internet*).

Web directories rely on human editors to evaluate and select websites in various subject categories.

A variety of tools are available to overcome these weaknesses of general-purpose search engines, and you should consider one or more of them in your business research. First, **web directories**, such as the Open Directory Project, use human editors to categorize and evaluate websites. A variety of other directories focus on specific media types, such as blogs or podcasts.

Second, *metasearch engines* (such as Bovée and Thill's Web Search, at **http://websearch.businesscommunicationnetwork.com**) help overcome the differences among search engines by formatting your search request for multiple search engines, making it easy to find a broader range of results. With a few clicks, you can compare results from multiple search engines to make sure you are getting a broad view of the material.

Online databases and specialty search engines can help you access parts of the hidden Internet.

Third, **online databases** help address the challenge of the hidden Internet by offering access to newspapers, magazines, journals, digital copies of books, and other resources often not available with standard search engines. Some of these databases offer free access to the public, but others require a subscription (check with your library). Also, a variety of specialized search engines now exist to reach various parts of the hidden Internet.

### Online Monitoring Tools

The tools available for monitoring for new information from online sources can help you track industry trends, consumer sentiment, and other information.

One of the most powerful aspects of online research is the ability to automatically monitor selected sources for new information. The possibilities include subscribing to newsfeeds from blogs, following people on Twitter and other microblogs, setting up alerts on search engines and online databases, and using specialized monitors such as TweetBeep and TweetDeck to track tweets that mention specific companies or other terms.

### Search Tips

Search tools work in different ways, and you can get unpredictable results if you don't know how each one operates.

Search engines, web directories, and databases work in different ways, so make sure you understand how to optimize your search and interpret the results for each tool you're using. With a *keyword search*, the engine or database attempts to find items that include all the words you enter. A *Boolean search* lets you define a query with greater precision, using such operators as AND (the search must include two terms linked by AND), OR (it can include either or both words), or NOT (the search ignores items with whatever word comes after NOT). *Natural language searches* let you ask questions in everyday English. *Forms-based searches* help you create powerful queries by simply filling out an online form.[5]

To make the best use of any search tool, keep the following points in mind:

- Think before you search. The neatly organized results you get from a search engine can create the illusion that

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the Internet is an orderly warehouse of all the information in the universe, but the reality is far different. The Internet is an incomplete, unorganized hodgepodge of millions of independent websites with information that ranges in value from priceless to utter rubbish. After you have identified what you need to know, spend a few moments thinking about where that information might be found, how it might be structured, and what terms various websites might use to describe it.

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**Try these 100 serious search tools**

This list is billed as "100 serious tools for academic search," but most are great tools for general business research, too. Go to **http://real-timeupdates.com/bce7**. Under "Students," click on "Learn More."

- Read the instructions and pay attention to the details. A few minutes of learning can save hours of inefficient search time.
- Review the search and display options carefully so you don't misinterpret the results; some of these settings can make a huge difference in the results you see.
- Try variations of your terms, such as *adolescent* and *teenager* or *management* and *managerial*.
- User fewer search terms to find more results; use more search terms to find fewer results.
- Look beyond the first page of results. Don't assume that the highest-ranking results are the best sources for you. For example, materials that haven't been optimized for search engines won't rank as highly (meaning they won't show up in the first few pages of results), but they may be far better for your purposes.

Search technologies continue to evolve rapidly, so look for new ways to find the information you need. Some new tools search specific areas of information (such as Twitter) in better ways, whereas others approach search in new ways. For instance, Yolink finds webpages like a regular search engine does but then also searches through documents and webpages that are linked to those first-level results.[6]

Other powerful search tools include *desktop search engines* that search all the files on your personal computer, *enterprise search engines* that search all the computers on a company's network, *research and content managers* such as Zotero, *social tagging* or *bookmarking sites* such as Reddit, and media curation sites such as Pinterest and Scoop.it.

**MOBILE APPS**

Access and add to your Zotero research files with a variety of Zotero-compatible mobile apps.

For information on the latest online research tools and techniques, visit http://real-timeupdates.com/bce7 and click on Chapter 10.

### DOCUMENTING YOUR SOURCES

Proper documentation of the sources you use is both ethical and an important resource for your readers.

Documenting your sources serves three important functions: It properly and ethically credits the person who created the original material, it shows your audience that you have sufficient support for your message, and it helps readers explore your topic in more detail, if desired. Be sure to take advantage of the source documentation tools in your software, such as automatic endnote or footnote tracking.

Appendix B discusses the common methods of documenting sources. Whatever method you choose, documentation is necessary for books, articles, tables, charts, diagrams, song lyrics, scripted dialogue, letters, speeches—anything you take from someone else, including ideas and information you've re-expressed through paraphrasing or summarizing. However, you do not have to cite a source for knowledge that's generally known among your readers, such as the fact that Microsoft is a large software company or that computers are pervasive in business today.

## Conducting Primary Research

**4 LEARNING OBJECTIVE**

Explain the role of primary research, and identify the two most common forms of primary research for business communication purposes.

If secondary research can't provide the information and insights you need, you may need to gather the information yourself with primary research. The two most common primary research methods for report writing are surveys and interviews. Other primary techniques are observations (including tracking the behavior of website visitors) and experiments (in special situations such as test marketing), but they're less commonly used for day-to-day business research.

Surveys and interviews are the most common primary research techniques.

### CONDUCTING SURVEYS

Surveys need to be reliable, valid, and representative to be useful.

Surveys can provide invaluable insights, but only if they are *reliable* (would produce identical results if repeated under similar conditions) and *valid* (measure what they're supposed to measure). To conduct a survey that generates reliable and valid results, you need to choose research participants carefully and develop an effective set of questions. For important surveys on strategically important topics with lots at stake, you're usually better off hiring a research specialist who knows how to avoid errors during planning, execution, and analysis. To develop an effective survey questionnaire, follow these tips:[7]

Provide clear instructions to prevent mistaken answers.

- Provide clear instructions to make sure people can answer every question correctly.
- Don't ask for information that people can't be expected to remember, such as how many times they went grocery shopping in the past year.
- Keep the questionnaire short and easy to answer; don't expect people to give you more than 10 or 15 minutes of their time.
- Whenever possible, formulate questions to provide answers that are easy to analyze. Numbers and facts are easier to summarize than opinions, for instance.
- Avoid *leading questions* that could bias your survey. If you ask, "Do you prefer that we stay open in the evenings for customer convenience?" you'll no doubt get a "yes." Instead, ask, "What time of day do you normally do your shopping?"
- Avoid ambiguous descriptors such as "often" or "frequently." Such terms mean different things to different people.
- Avoid compound questions such as "Do you read books and magazines?"

When selecting people to participate in a survey, the most critical task is getting a *representative sample* of the entire population in question. For instance, if you want to know how U.S. consumers feel about something, you can't just survey a few hundred people in a shopping mall. Different types of consumers shop at different times of the day and different days of the week, and many consumers rarely, if ever, shop at malls. The surveys you see on many websites potentially suffer from the same *sampling bias*: They capture only the opinions of people who visit the sites and who want to participate, which might not be a representative sample of the population. A good handbook on survey research will help you select the right people for your survey, including selecting enough people to have a statistically valid survey.[8]

### CONDUCTING INTERVIEWS

Interviews can take place online, over the phone, or in person, and they can involve individuals or groups.

Getting in-depth information straight from an expert, customer, or other interested party can be a great method for collecting primary information. Interviews can have a variety of formats, from email exchanges to group discussions.

Open-ended questions, which can't be answered with a simple yes or no, can provide deeper insights, opinions, and information.

Ask **open-ended questions** (such as "Why do you believe that South America represents a better opportunity than Europe for this product line?") to solicit opinions, insights, and information. Ask **closed questions** to elicit a specific answer, such as yes or no. However, don't use too many closed questions in an interview, or the experience will feel more like a simple survey and won't take full advantage of the interactive interview setting.

Arrange the sequence of questions to help uncover layers of information.

Think carefully about the sequence of your questions and the potential answers so you can arrange them in an order that helps uncover layers of information. Also consider providing each subject with a list of questions at least a day or two before the interview, especially if you'd like to quote your subjects in writing or if your questions might require people to conduct research or think extensively about the answers. If you want to record interviews, ask ahead of time; never record without permission.

## Planning Informational Reports

5 LEARNING OBJECTIVE
Explain how to plan informational reports and website content.

Informational reports provide the feedback that employees, managers, and others need in order to make decisions, take action, and respond to changes. As Figure 10.1 indicates, informational reports can be grouped into four general categories:

- **Reports to monitor and control operations.** Managers rely on a wide range of reports to see how well their companies are functioning. *Plans* establish expectations and guidelines to direct future action. Among the most important of these are *business plans*, which summarize a proposed business venture and describe the company's goals and plans for each major functional area. *Operating reports* provide feedback on a wide variety of an organization's functions, including sales, inventories, expenses, shipments, and so on. *Personal activity* reports provide information regarding an individual's experiences during sales calls, industry conferences, and other activities.

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- **Reports to implement policies and procedures.** *Policy reports* range from brief descriptions of business procedures to manuals that run dozens or hundreds of pages. *Position papers*, sometimes called *white papers* or *backgrounders*, outline an organization's official position on issues that affect the company's success.
- **Reports to demonstrate compliance.** Businesses are required to submit a variety of *compliance reports*, from tax returns to reports describing the proper handling of hazardous materials.
- **Reports to document progress.** Supervisors, investors, and customers frequently expect to be informed of the progress of projects and other activities. *Progress reports* range from simple updates in memo form to comprehensive status reports.

Informational reports are used to monitor and control operations, to implement policies and procedures, to demonstrate compliance, and to document progress.

## ORGANIZING INFORMATIONAL REPORTS

In most cases, the direct approach is the best choice for informational reports because you are simply conveying information. However, if the information is disappointing, such as a project being behind schedule or over budget, you might consider using the indirect approach to build up to the bad news. Most informational reports use a **topical organization**, arranging material in one of the following ways:

The messages conveyed by informational reports can range from extremely positive to extremely negative, so the approach you take warrants careful consideration.

- **Comparison.** Showing similarities and differences (or advantages and disadvantages) between two or more entities
- **Importance.** Building up from the least important item to the most important (or from most important to the least, if you don't think your audience will read the entire report)
- **Sequence.** Organizing the steps or stages in a process or procedure
- **Chronology.** Organizing a chain of events in order from oldest to newest or vice versa
- **Geography.** Organizing by region, city, state, country, or other geographic unit
- **Category.** Grouping by topical category, such as sales, profit, cost, or investment

## ORGANIZING WEBSITE CONTENT

Many websites, particularly company websites, function as informational reports, offering sections with information about the company and its history, products and services, executive team, and so on. Most of what you've already learned about informational reports applies to website writing, but the online environment requires some special considerations:

- **Web readers are demanding.** If they can't find what they're looking for in a few minutes, most site visitors will click away to another site.[9]
- **Reading online can be difficult.** Studies show that reading speeds are about 25 percent slower on a monitor than on paper.[10] Reading from computer screens can also be exhausting and a source of physical discomfort.[11]
- **The web is a nonlinear, multidimensional medium.** Readers of online material move around in any order they please; there often is no beginning, middle, or end.

When planning online reports or other website content, remember that the online reading experience differs from offline reading in several important ways.

In addition, many websites have to perform more than one communication function and therefore have more than one purpose. Each of these individual purposes needs to be carefully defined and then integrated into an overall statement of purpose for the entire website.[12]

Moreover, many websites also have multiple target audiences, such as potential employees, customers, investors, and the news media. You need to analyze each group's unique information needs and find a logical way to organize all that material. Website designers use the term **information architecture** to describe the structure and navigational flow of

The information architecture of a website is the equivalent of the outline for a paper report, but it tends to be much more complicated than a simple linear outline.

all the parts of a website. As you develop the site architecture, you can begin to simulate how various audiences will enter and explore the site. Accommodating multiple entry points is one of the most difficult tasks in site design.[13]

To organize your site effectively, keep the following advice in mind:

- If you know that a sizable percentage of your target audience will access your site with mobile devices, take a *mobile-first* approach: Design the site to work with tablets and smartphones, then make sure it functions well on conventional computer screens as well.
- Plan your site structure and navigation before you write.[14]
- Let your readers be in control by creating links and pathways that let them explore on their own.
- Help online readers scan and absorb information by breaking it into self-contained, easily readable chunks that are linked together logically.

## Planning Analytical Reports

6 LEARNING OBJECTIVE
Identify the three most common ways to organize analytical reports.

The purpose of analytical reports is to analyze, to understand, or to explain—to think through a problem or an opportunity and explain how it affects an organization and how the organization should respond. In many cases, you'll also be expected to make a recommendation based on your analysis. As you saw in Figure 10.1, analytical reports fall into three basic categories:

Analytical reports are used to assess opportunities, to solve problems, and to support decisions.

- **Reports to assess opportunities.** Every business opportunity carries some degree of risk and requires a variety of decisions and actions to capitalize on the opportunity. You can use analytical reports to assess both risk and required decisions and actions. For instance, *market analysis reports* are used to judge the likelihood of success for new products or sales. *Due diligence* reports examine the financial aspects of a proposed decision, such as acquiring another company.
- **Reports to solve problems.** Managers often assign *troubleshooting reports* when they need to understand why something isn't working properly and how to fix it. A variation, the *failure analysis report*, studies events that happened in the past, with the hope of learning how to avoid similar failures in the future.
- **Reports to support decisions.** *Feasibility reports* explore the potential ramifications of a decision that managers are considering, and *justification reports* explain a decision that has already been made.

Writing analytical reports presents a greater challenge than writing informational reports, for three reasons. First, you're doing more than simply delivering information—you're also analyzing a situation and presenting your conclusions. Second, when your analysis is complete, you need to present your thinking in a compelling and persuasive manner. Third, analytical reports often convince other people to make significant financial and personnel decisions, and these reports carry the added responsibility of the consequences of such decisions.

### FOCUSING ON CONCLUSIONS

Focusing on conclusions is often the best approach when you're addressing a receptive audience.

When planning reports for audiences that are likely to accept your conclusions—either because they've asked you to perform an analysis or they trust your judgment—consider using the direct approach, focusing immediately on your conclusions. This structure communicates the main idea quickly, but it does present some risks. Even if audiences trust your judgment, they may have questions about your data or the methods you used. Moreover, starting with a conclusion may create the impression that you have oversimplified the situation. To give readers the opportunity to explore the thinking behind your conclusion, support that conclusion with solid reasoning and evidence (see Figure 10.6).

### FOCUSING ON RECOMMENDATIONS

When readers want to know what you think they should do, organize your report to focus on recommendations.

A slightly different approach is useful when your readers want to know what they ought to do in a given situation (as opposed to what they ought to conclude). The actions you want your readers to take become the main subdivisions of your report.

In keeping with the direct approach, the report will open with the conclusion that the program is a success.

These two sections will support the conclusion with evidence from two key areas.

This section will complete the story by highlighting areas that still need improvement.

**MEASURING QUALITY IMPROVEMENTS**

I. Introduction

II. Conclusion: Outsourcing employee training has reduced costs and improved quality

III. Cost reductions

  A. Exceeded 15 percent cost-reduction goal with 22 percent savings in first year

  B. Achieved actual reduction of 22 percent

  C. Reassigned three staffers who used to work on training full-time

  D. Reduced management time needed to oversee training

  E. Sold the computers that used to be reserved for training

IV. Quality improvements

  A. Employees say they are more confident in 7 out of 10 key skill areas

  B. Measurable mistakes have dropped by 12 percent

V. Areas needing improvement

  A. Three skill areas still need improvement

  B. Two trainers received approval ratings below 80 percent

  C. Outside trainers aren't always aware of internal company issues

  D. We have lost some flexibility for scheduling courses

VI. Summary

**Figure 10.6 Preliminary Outline of a Research Report Focusing on Conclusions**
A year after a bank decided to have an outside firm handle its employee training, an analyst was asked to prepare a report evaluating the results. The analysis shows that the outsourcing experiment was a success, so the report opens with that conclusion but supports it with clear evidence. Readers who accept the conclusion can stop reading, and those who desire more information can continue.

When structuring a report around recommendations, use the direct approach, as you would for a report that focuses on conclusions. Then unfold your recommendations using a series of five steps:

1. Establish the need for action in the introduction by briefly describing the problem or opportunity.
2. Introduce the benefit(s) that can be achieved if the recommendation is adopted, along with any potential risks.
3. List the steps (recommendations) required to achieve the benefit, using action verbs for emphasis.
4. Explain each step more fully, giving details on procedures, costs, and benefits; if necessary, also explain how risks can be minimized.
5. Summarize your recommendations.

## FOCUSING ON LOGICAL ARGUMENTS

When readers are potentially skeptical or hostile, consider using the indirect approach to logically build toward your conclusion or recommendation. If you guide readers along a rational path toward the answer, they are more likely to accept it when they encounter it. The two most common logical approaches are known as the *2 + 2 = 4 approach*, in which you convince readers by demonstrating that everything adds up to your conclusion, and the *yardstick approach*, in which you use a number of criteria to decide which option to select from two or more possibilities (see Figure 10.7 on the next page).

Logical arguments can follow two basic approaches: 2 + 2 = 4 (adding everything up) and the yardstick method (comparing ideas against a predetermined set of standards).

**MEMO**

**TO:** Robert Mendoza, Vice President of Marketing
**FROM:** Binh Phan, National Sales Manager BP
**DATE:** September 15, 2015
**SUBJECT:** Major accounts sales problems

The first paragraph verifies who requested the report, when it was requested, and who wrote it.

As you requested on August 20, this report outlines the results of my investigation into the recent slowdown in sales to major accounts and the accompanying rise in sales- and service-related complaints from some of our largest customers.

The second paragraph highlights the serious nature of the problem.

Over the last four quarters, major account sales dropped 12%, whereas overall sales were up 7%. During the same time, we've all noticed an increase in both formal and informal complaints from larger customers, regarding how confusing and complicated it has become to do business with us.

This section explains how the information used in the analysis was collected.

My investigation started with in-depth discussions with the four regional sales managers, first as a group and then individually. The tension I felt in the initial meeting eventually bubbled to the surface during my meetings with each manager. Staff members in each region are convinced that other regions are booking orders they don't deserve, with one region doing all the legwork only to see another region get the sale, the commission, and the quota credit.

I followed up these formal discussions by talking informally and exchanging email with several sales representatives from each region. Virtually everyone who is involved with our major national accounts has a story to share. No one is happy with the situation, and I sense that some reps are walking away from major customers because the process is so frustrating.

The decline in sales to our major national customers and the increase in their complaints stem from two problems: (1) sales force organization and (2) commission policy.

**ORGANIZATIONAL PROBLEMS**

Organizational problems are the first "2" in Phan's 2 + 2 = 4 approach.

Phan describes the first problem and explains how it occurred, without blaming anyone personally.

When we divided the national sales force into four geographical regions last year, the idea was to focus our sales efforts and clarify responsibilities for each prospective and current customer. The regional managers have gotten to know their market territories very well, and sales have increased beyond even our most optimistic projections.

However, while solving one problem, we have created another. In the past 12 to 18 months, several regional customers have grown to national status, and a few retailers have taken on (or expressed interest in) our products. As a result, a significant portion of both current sales and future opportunities lies with these large national accounts.

I uncovered more than a dozen cases in which sales representatives from two or more regions found themselves competing with each other by pursuing the same customers from different locations. Moreover, the complaints from our major accounts about overlapping or nonexistent account coverage are a direct result of the regional organization. In some cases, customers aren't sure which of our representatives they're supposed to call with problems and orders. In other cases, no one has been in contact with them for several months.

***(continued)***

**Figure 10.7 Analytical Report Focusing on Logical Arguments**
As national sales manager of a New Hampshire sporting goods company, Binh Phan was concerned about his company's ability to sell to its largest customers. His boss, the vice president of marketing, shared these concerns and asked Phan to analyze the situation and recommend a solution. In this troubleshooting report, his main idea is that the company should establish separate sales teams for these major accounts, rather than continuing to service them through the company's four regional divisions. However, Phan knew his plan would be controversial because it required a big change in the company's organization and in the way sales reps are paid. His thinking had to be clear and easy to follow, so he focused on logical argumentation.

# Planning Proposals

**7 LEARNING OBJECTIVE**
Explain how to plan proposals.

Proposals can be grouped into two general categories. *Internal proposals* (see Figure 10.8 on page 298) request decisions from managers within the organization. *External proposals* request decisions from parties outside the organization. For example, *investment proposals* request funding from outside investors, *grant proposals* request funds from government agencies and other sponsoring organizations, and *sales proposals* present solutions for potential customers and request purchase decisions.

The most significant factor in planning a proposal is whether the recipient has asked you to submit a proposal. *Solicited proposals* are generally prepared at the request of external

2

Phan brings the first problem to life by complementing the general description with a specific example.

For example, having retail outlets across the lower tier of the country, AmeriSport received pitches from reps out of our West, South, and East regions. Because our regional offices have a lot of negotiating freedom, the three were offering different prices. But all AmeriSport buying decisions were made at the Tampa headquarters, so all we did was confuse the customer. The irony of the current organization is that we're often giving our weakest selling and support efforts to the largest customers in the country.

Commission problems are the second "2" in Phan's 2 + 2 = 4 approach.

**COMMISSION PROBLEMS**

In discussing the second problem, he simplifies the reader's task by maintaining a parallel structure: a general description followed by a specific example.

The regional organization problems are compounded by the way we assign commissions and quota credit. Salespeople in one region can invest a lot of time in pursuing a sale, only to have the customer place the order in another region. So some sales rep in the second region ends up with the commission on a sale that was partly or even entirely earned by someone in the first region. Therefore, sales reps sometimes don't pursue leads in their regions, thinking that a rep in another region will get the commission.

For example, Athletic Express, with outlets in 35 states spread across all four regions, finally got so frustrated with us that the company president called our headquarters. Athletic Express has been trying to place a large order for tennis and golf accessories, but none of our local reps seem interested in paying attention. I spoke with the rep responsible for Nashville, where the company is headquartered, and asked her why she wasn't working the account more actively. Her explanation was that last time she got involved with Athletic Express, the order was actually placed from their L.A. regional office, and she didn't get any commission after more than two weeks of selling time.

Phan concludes the 2 + 2 = 4 approach: organizational problems + commission problems = the need for a new sales structure.

**RECOMMENDATIONS**

Our sales organization should reflect the nature of our customer base. To accomplish that goal, we need a group of reps who are free to pursue accounts across regional borders—and who are compensated fairly for their work. The most sensible answer is to establish a national account group. Any customers whose operations place them in more than one region would automatically be assigned to the national group.

He explains how his recommendation (a new organizational structure) will solve both problems.

In addition to solving the problem of competing sales efforts, the new structure will also largely eliminate the commission-splitting problem because regional reps will no longer invest time in prospects assigned to the national accounts team. However, we will need to find a fair way to compensate regional reps who are losing long-term customers to the national team. Some of these reps have invested years in developing customer relationships that will continue to yield sales well into the future, and everyone I talked to agrees that reps in these cases should receive some sort of compensation. Such a "transition commission" would also motivate the regional reps to help ensure a smooth transition from one sales group to the other. The exact nature of this compensation would need to be worked out with the various sales managers.

He acknowledges that the recommended solution does create a temporary compensation problem but expresses confidence that a solution to that can be worked out.

3

**SUMMARY**

The summary concisely restates both the problem and the recommended solution.

The regional sales organization is effective at the regional and local levels but not at the national level. We should establish a national accounts group to handle sales that cross regional boundaries. Then we'll have one set of reps who are focused on the local and regional levels and another set who are pursuing national accounts.

To compensate regional reps who lose accounts to the national team, we will need to devise some sort of payment to reward them for the years of work invested in such accounts. This can be discussed with the sales managers once the new structure is in place.

**Figure 10.7** **Analytical Report Focusing on Logical Arguments (*continued*)**

**MEMO**

**TO:** Jamie Engle
**FROM:** Shandel Cohen SC
**DATE:** July 8, 2015
**SUBJECT:** Saving $145k/year with an automated email response system

A subject line with a compelling promise catches the reader's attention.

**THE PROBLEM:**
**Expensive and Slow Response to Customer Information Requests**

Our new product line has been very well received, and orders have surpassed our projections. This very success, however, has created a shortage of printed brochures, as well as considerable overtime for people in the customer response center. As we introduce upgrades and new options, our printed materials quickly become outdated. If we continue to rely on printed materials for customer information, we have two choices: Distribute existing materials (even though they are incomplete or inaccurate) or discard existing materials and print new ones.

"The Problem" describes the current situation and explains why it should be fixed.

**THE SOLUTION:**
**Automated Email Response System**

"The Solution" explains the proposed solution in enough detail to make it convincing, without burdening the reader with excessive detail.

With minor additions and modifications to our current email system, we can set up an automated system to respond to customer requests for information. This system can save us time and money and can keep our distributed information current.

Automated email response systems have been tested and proven effective. Many companies already use this method to respond to customer information requests, so we won't have to worry about relying on untested technology. Using the system is easy, too: Customers simply send a blank email message to a specific address, and the system responds by sending an electronic copy of the requested brochure.

**Benefit #1 : Always-Current Information**

Listing a number of compelling benefits as subheadings builds reader interest in the proposed solution.

Rather than discard and print new materials, we would only need to keep the electronic files up to date on the server. We could be able to provide customers and our field sales organization with up-to-date, correct information as soon as the upgrades or options are available.

**Benefit #2: Instantaneous Delivery**

Almost immediately after requesting information, customers would have that information in hand. Electronic delivery would be especially advantageous for our international customers. Regular mail to remote locations sometimes takes weeks to arrive, by which time the information may already be out of date. Both customers and field salespeople will appreciate the automatic mail-response system.

**Benefit #3: Minimized Waste**

With our current method of printing every marketing piece in large quantities, we discard thousands of pages of obsolete catalogs, data sheets, and other materials every year. By maintaining and distributing the information electronically, we would eliminate this waste. We would also free up a considerable amount of expensive floor space and shelving that is required for storing printed materials.

***(continued)***

**Figure 10.8** **Internal Proposal**
Shandel Cohen's internal proposal seeks management's approval to install an automatic mail-response system. She lays out the problem concisely, describes her proposed solution, itemizes the four benefits it would provide, and provides a clear analysis of the financial impact.

When submitting a solicited proposal in response to an RFP, follow its instructions to the letter.

Unsolicited proposals require more creativity because readers don't expect them and may not even be aware of the problem or opportunity you want to address.

parties that require a product or a service, but they may also be requested by such internal sources as management or the board of directors. Some organizations prepare a formal invitation to bid on their contracts, called a **request for proposals (RFP)**, which includes instructions that specify exactly the type of work to be performed or products to be delivered, along with budgets, deadlines, and other requirements. Other companies then respond by preparing proposals that show how they would meet those needs. In most cases, organizations that issue RFPs also provide strict guidelines on what the proposals should include, and you need to follow these guidelines carefully in order to be considered.

*Unsolicited proposals* offer more flexibility but a completely different sort of challenge because recipients aren't expecting to receive them. In fact, your audience may not be aware

She acknowledges one potential shortcoming with the new approach but provides a convincing solution to that as well.

2

Of course, some of our customers may still prefer to receive printed materials, or they may not have access to electronic mail. For these customers, we could simply print copies of the files when we receive such requests. The new Xerox DocuColor printer just installed in the Central Services building would be ideal for printing high-quality materials in small quantities.

**Benefit #4: Lower Overtime Costs**

In addition to saving both paper and space, we would also realize considerable savings in wages. Because of the increased interest in our new products, we must continue to work overtime or hire new people to meet the demand. An automatic mail response system would eliminate this need, allowing us to deal with fluctuating interest without a fluctuating workforce.

**Cost Analysis**

The necessary equipment and software costs approximately $15,000. System maintenance and upgrades are estimated at $5,000 per year. However, those costs are offset many times over by the predicted annual savings:

A detailed breakdown of cost savings provides credible support for the $145k/year claim made in the subject line.

| | |
|---|---|
| Printing | $100,000 |
| Storage | 25,000 |
| Postage | 5,000 |
| Wages | 20,000 |
| **Total** | **$150,000** |

Based on these figures, the system would save $130,000 the first year and $145,000 every year after that.

Her conclusion summarizes the benefits and invites further discussion.

**CONCLUSION**

An automated email response system would yield considerable benefits in both customer satisfaction and operating costs. If you approve, we can have it installed and running in 6 weeks. Please give me a call if you have any questions.

**Figure 10.8** Internal Proposal (*continued*)

of the problem or opportunity you are addressing, so before you can propose a solution, you might first need to convince your readers that a problem or an opportunity exists. Consequently, the indirect approach is often the wise choice for unsolicited proposals.

Regardless of its format and structure, a good proposal explains what a project or course of action will involve, how much it will cost, and how the recipient and his or her organization will benefit.

# Chapter Review and Activities

## Learning Objectives: Check Your Progress

**Objective 1: Adapt the three-step writing process to reports and proposals.**

To adapt the three-step process to reports and proposals, apply what you learned in Chapters 3 through 5, with particular emphasis on clearly identifying your purpose, preparing a work plan, determining whether a separate research project might be needed, choosing the medium and channel, and selecting the best approach for the specific type of report.

**Objective 2: Describe an effective process for conducting business research, explain how to evaluate the credibility of an information source, and identify the five ways to use research results.**

Begin the research process with careful planning to make sure you focus on the most important questions. Then locate the data and information, using primary and secondary research as needed. Process the results of your research, and apply your findings by summarizing information, drawing conclusions, or developing recommendations. Finally, manage information effectively so that you and others can retrieve it later and reuse it in other projects.

Evaluating the credibility of an information source can involve eight questions. (1) Does the source have a reputation for honesty and reliability? (2) Is the source potentially biased? (3) What is the purpose of the material? (4) Is the author credible? (5) Where did the source get *its* information? (6) Can you verify the material independently? (7) Is the material current and complete? (8) Does the information make sense?

Five ways to use research results are quoting, paraphrasing, or summarizing textual material; drawing conclusions; and making recommendations.

**Objective 3: Explain the role of secondary research, and describe the two major categories of online research tools.**

Secondary research is generally used first, both to save time in case someone else has already gathered the information needed and to offer additional insights into your research questions. The two major categories of online research tools are tools used for searching (including various types of search engines, web directories, and online databases) and tools used for automatically monitoring for new information.

**Objective 4: Explain the role of primary research, and identify the two most common forms of primary research for business communication purposes.**

Primary research involves the collection of new data, and it is conducted when the information required is not available through secondary research. The two most common primary research methods for business communication purposes are surveys and interviews.

**Objective 5: Explain how to plan informational reports and website content.**

Informational reports focus on the delivery of facts, figures, and other types of information. Most informational reports use a topical organization, arranging material by comparison, importance, sequence, chronology, geography, or category.

When developing online reports and websites in general, start by planning the structure and navigation paths before writing the content. Next, make sure you let readers be in control by giving them navigational flexibility. Finally, break your information into chunks that can be scanned and absorbed quickly.

**Objective 6: Identify the three most common ways to organize analytical reports.**

Analytical reports assess a situation or problem and recommend a course of action in response. The three most common ways to organize analytical reports are by focusing on conclusions, focusing on recommendations, and focusing on logical arguments.

**Objective 7: Explain how to plan proposals.**

The most significant factor in planning a proposal is whether the proposal is solicited or unsolicited. Solicited proposals are obviously expected and welcomed by the recipient, but they often must follow a specific organization, particularly when they are submitted in response to a request for proposals (RFP). For unsolicited proposals, the writer has flexibility in choosing the most effective organization, format, and content. However, because unsolicited proposals are unexpected, the writer often needs to explain why the solution offered in the proposal is even necessary for the reader to consider. Because of this, the indirect approach is usually preferred for unsolicited proposals.

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## Test Your Knowledge

To review chapter content related to each question, refer to the indicated Learning Objective.

**10-1.** What are the three basic categories of reports? [LO-1]

**10-2.** What is typically covered in the work plan for a report? [LO-1]

✪ **10-3.** How would you evaluate information sources while collecting data? [LO-2]

✪ **10-4.** Explain the benefits of using primary research and secondary research. [LO-3]

**10-5.** How do proposal writers use an RFP? [LO-7]

## Apply Your Knowledge

To review chapter content related to each question, refer to the indicated Learning Objective.

✪ **10-6.** Assume you have to prepare a report on social stigmas associated with leprosy, for which you need to conduct secondary research. Because there is no printed material in your library, which online tools would you adopt in conducting your research? What type of search engine would be most useful for finding your data? Is it imperative to document your sources? [LO-3]

✪ **10-7.** Can you use the same approach for planning website content as you use for planning printed reports? Why or why not? [LO-5]

**10-8.** If you were writing a recommendation report for an audience that doesn't know you, would you use the direct approach, focusing on the recommendation, or the indirect approach, focusing on logic? Why? [LO-6]

## Practice Your Skills

### Activities

Each activity is labeled according to the primary skill or skills you will need to use. To review relevant chapter content, you can refer to the indicated Learning Objective. In some instances, supporting information will be found in another chapter, as indicated.

**10-9. Planning: Analyzing the Situation [LO-1]** Kleen Care is an established brand name in premium toiletries for the last five years. At a recent shareholder meeting, it was announced that the company plans to laterally expand its product range by introducing bath accessories such as bathrobes, towels, bath-mats, and loofahs. The company has yet to decide on whether to indigenously manufacture these products or outsource them to a supplier and market them under the Kleen Care brand. You have been commissioned to analyze whether the company should enter this market, and whether it should manufacture or outsource production of these products. You are to gather competitive information and prepare a business report for the management to review. What steps would you undertake in preparing a work plan for an analytical report that will establish the risks and rewards of introducing this product range? Include a statement of purpose, a description of what might emerge from your study, the sources and methods of data collection, and a preliminary outline. Would you use a direct or indirect approach in organizing the information in your report?

**10-10.** **Research: Documenting Sources [LO-2]** Select five business articles from a combination of print and online sources. Develop a resource list, using Appendix B as a guideline.

**Research: Conducting Secondary Research [LO-3]:** Using online, database, or printed sources, find the following information. Be sure to properly cite your sources, using the formats discussed in Appendix B.

**10-11.** Contact information for the American Management Association

**10-12.** Median weekly earnings of men and women by occupation

**10-13.** Current market share for Perrier water

**10-14.** Performance ratios for office supply retailers

**10-15.** Annual stock performance for Hewlett-Packard (HP)

**10-16.** Number of franchise outlets in the United States

**10-17.** Composition of the U.S. workforce by profession

**10-18.** **Research: Conducting Secondary Research [LO-3]** Select any public company and find the following information:

- Names of the company's current officers
- List of the company's products or services (or, if the company has a large number of products, the product lines or divisions)
- Some important current issues in the company's industry
- The outlook for the company's industry as a whole

**10-19.** **Research: Conducting Primary Research [LO-4]** Claris Inc. is an advertising agency that is pitching for a new account at the baby food company Baby Bright. The agency has never held any previous account in this business and has no idea of what the market is like. Your research agency has been hired to assess customer behavior and market responsiveness in this category by asking relevant target audiences to complete a questionnaire. Design a questionnaire to solicit valid answers for a report to Claris Inc. about the current market, competitive information, and customer rationale in arriving at brand preferences so that the agency may be able to clearly prepare a strategy for the pitch.

**10-20.** **Research: Conducting Primary Research [LO-4]** You're conducting an information interview with a manager in another division of your company. Partway through the interview, the manager shows clear signs of impatience. How should you respond? What might you do differently to prevent this from happening in the future? Explain your answers.

**10-21.** **Message Strategies: Informational Reports [LO-5]** To invest in a term deposit with your bank you must fill out a rather long questionnaire. The bank provides the option of filling out this questionnaire in physical form or electronically, but mandates that all potential customers carefully read the long list of compliance terms and conditions. You have the option of either meeting with your portfolio manager and having the terms explained to you, or you could choose to read the terms online and fill in the form. Which version would you prefer and why? Choose any term deposit questionnaire and demonstrate how you would better plan and organize the information presented.

**10-22.** **Message Strategies: Informational Reports [LO-5]** Due to inordinate delays in the completion of your prestigious residential building project, many irate investors have demanded a report on why these delays have occurred as well as a project report informing them of the status periodically. Prepare a crisp one-page report responding to their queries and informing them of the anticipated stage-wise completion of the project. Create your own scenario.

**10-23.** **Message Strategies: Informational Reports [LO-5]** From your college library or company websites, find the annual reports recently released by two corporations in the same industry. Analyze each report, and be prepared to discuss the following questions in class:

- What organizational differences, if any, do you see in the way each corporation discusses its annual performance? Are the data presented clearly so that shareholders can draw conclusions about how well the company performed?
- What goals, challenges, and plans do top managers emphasize in their discussion of results?
- How do the format and organization of each report enhance or detract from the information being presented?

**10-24.** **Message Strategies: Informational Reports [LO-5]** Assume that your college president has received many student complaints about campus parking problems. You are appointed to chair a student committee organized to investigate the problems and recommend solutions. The president gives you a file labeled "Parking: Complaints from Students," and you jot down the essence of the complaints as you inspect the contents. Your notes look like this:

- Inadequate student spaces at critical hours
- Poor night lighting near the computer center
- Inadequate attempts to keep resident neighbors from occupying spaces
- Dim marking lines
- Motorcycles taking up full spaces
- Discourteous security officers
- Spaces (usually empty) reserved for college officials

- Relatively high parking fees
- Full fees charged to night students even though they use the lots only during low-demand periods
- Vandalism to cars and a sense of personal danger
- Inadequate total space
- Harassment of students parking on the street in front of neighboring houses

Now prepare an outline for an informational report to be submitted to committee members. Use a topical organization for your report that categorizes this information.

**Message Strategies: Analytical Reports** [LO-6] Of the organizational approaches introduced in the chapter, which is best suited for writing a report that answers the following questions? Briefly explain why.

**10-25.** In which market segment—energy drinks or traditional soft drinks—should Fizz Drinks, Inc., introduce a new drink to take advantage of its enlarged research and development budget?

**10-26.** Should Major Manufacturing, Inc., close down operations of its antiquated Bellville, Arkansas, plant despite the adverse economic impact on the town that has grown up around the plant?

**10-27.** Should you and your partner adopt a new accounting method to make your financial statements look better to potential investors?

**10-28.** Do you believe your team can maintain a healthy work–life balance considering the recent announcement of 10 customer calls a day?

**10-29.** What are some reasons for the recent data loss at the college computer center, and how can we avoid similar problems in the future?

**10-30. Message Strategies: Proposals; Collaboration: Team Projects** [LO-7], **Chapter 2** Break into small groups and identify an operational problem occurring at your campus—perhaps involving registration, university housing, food services, parking, or library services. Then develop a workable solution to that problem. Finally, develop a list of pertinent facts that your team will need to gather to convince readers that the problem exists and that your solution will work.

## Expand Your Skills

### Critique the Professionals

Company websites function as multidimensional informational reports, with numerous sections and potentially endless ways for visitors to navigate through all the various pages. Locate the website of a public corporation with a fairly complex website. Imagine that you are approaching the site as (a) a potential employee, (b) a potential investor (purchaser of stock), (c) a member of one of the local communities in which this company operates, and (d) a potential customer of the company's products and services. Analyze how easy or difficult it is to find the information each of these four visitors would typically be seeking. Using whatever medium your instructor requests, write a brief analysis of the information architecture of the website, describing what works well and what doesn't.

### Sharpen Your Career Skills Online

Bovée and Thill's Business Communication Web Search, at **http://websearch.businesscommunicationnetwork.com**, is a unique research tool designed specifically for business communication research. Use the Web Search function to find a website, video, PDF document, podcast, or presentation that offers advice on conducting research for business reports. Write a brief email message to your instructor or a post for your class blog, describing the item you found and summarizing the career skills information you learned from it.

## Cases

Website links for selected companies mentioned in cases can be found in the Student Assignments section at **http://real-timeupdates.com/bce7**.

### Informational Reports

**10-31. Message Strategies: Informational Reports [LO-5]**
Concern is growing in many youth sports about the negative consequences of existing approaches to player development and competition. The long-term athlete development (LTAD) approach aims to instill methods and mindsets that will make athlete development more successful in the long run while making sports more enjoyable for kids. The American Development Model (ADM) used by USA Hockey is one example of the LATD approach in a specific sport.

**Your task:** Visit USA Hockey's website and review the information on ADM. Write a brief informational report (one to two pages) on the ADM concept, including the rationale behind it and the benefits it offers youth athletes.

**10-32. Message Strategies: Informational Reports [LO-5]**
Anyone contemplating stock market investing is likely to shudder at least a little bit at the market's penchant for taking a tumble now and again.

**Your task:** Write a brief informational report that contains a chart of one of the major stock market indices (such as the Dow Jones Industrial Average or the S&P 500) over the past 20 years. Pick out four significant drops in the index during this time period and investigate economic or political events that occurred immediately before or during these declines. Briefly describe the events and their likely effect on the stock market.

**10-33. Message Strategies: Informational Reports [LO-5]**
You've put a lot of work into your college classes so far—make sure you don't have any glitches as you get ready to claim your certificate or degree.

**Your task:** Prepare an interim progress report that details the steps you've taken toward completing your graduation or certification requirements. After examining the requirements listed in your college catalog, indicate a realistic schedule for completing those that remain. In addition to course requirements, include steps such as completing the residency requirement, completing all necessary forms, and paying fees. Use a memo format for your report, and address it to anyone who is helping or encouraging you through school.

### WIKI SKILLS/TEAM SKILLS

**10-34. Message Strategies: Informational Reports; Media Skills: Wiki Writing [LO-1], [LO-2]** The use of social networks by employees during work hours remains a controversial topic, with some companies encouraging networking, some at least allowing it, and others prohibiting it.

**Your task:** Using the free wiki service offered by Zoho or a comparable system, collaborate on a report that summarizes the potential advantages and disadvantages of allowing social network use in the workplace.

### BLOGGING SKILLS/TEAM SKILLS

**10-35. Message Strategies: Informational Reports [LO-5]** If you're like many other college students, your first year was more than you expected: more difficult, more fun, more frustrating, more expensive, more exhausting, more rewarding—more of everything, positive and negative. Oh, the things you know now that you didn't know then!

**Your task:** With several other students, identify five or six things you wish you had realized or understood better before you started your first year of college. These can relate to your school life (such as "I didn't realize how much work I would have for my classes" or "I should've asked for help as soon as I got stuck") and your personal and social life ("I wish I had been more open to meeting people"). Use these items as the foundation of a brief informational report you could post on a blog that is read by high school students and their families. Your goal with this report is to help the next generation of students make a successful and rewarding transition to college.

### WEB WRITING SKILLS

**10-36. Message Strategies: Online Content [LO-5]** As you probably experienced, trying to keep all the different schools straight in one's mind while researching and applying for colleges can be rather difficult. Applicants and their families would no doubt appreciate a handy summary of your college or university's key points as they relate to the selection and application process.

**Your task:** Adapt content from your college or university's website to create a one-page "Quick Facts" sheet about your school. Choose the information you think prospective students and their families would find most useful. (Note that adapting existing content would be acceptable in a real-life scenario like this, because you would be reusing content on behalf of the content owner. Doing so would definitely *not* be acceptable if you were using the content for yourself or for someone other than the original owner.)

## Analytical Reports

### EMAIL SKILLS

**10-37. Message Strategies: Analytical Reports [LO-1] [LO-2]** Your company develops a mobile phone app that helps people get detailed technical information about products while they are shopping. The original plan was to incorporate Quick Reference (QR) codes into the app so that people could scan QR stickers placed on product displays in retail stores. After decoding the QR code, the app would then pull up information about the product on display. However, you've recently learned about *near-field communication*, a short-range radio technology that might be able to accomplish the same thing in a way that is simpler for consumers to use.

**Your task:** Research the prospects for QR codes and NFC technology and write a short comparative report. Draw a conclusion about which technology you think will dominate in the coming years.

**10-38. Message Strategies: Analytical Reports [LO-6]** Mistakes can be wonderful learning opportunities if we're honest with ourselves and receptive to learning from the mistake.

**Your task:** Identify a mistake you've made—something significant enough to have cost you a lot of money, wasted a lot of time, harmed your health, damaged a relationship, created serious problems at work, prevented you from pursuing what could've been a rewarding opportunity, or otherwise had serious consequences. Now figure out why you made that mistake. Did you let emotions get in the way of clear thinking? Did you make a serious financial blunder because you didn't take the time to understand the consequences of a decision? Were you too cautious? Not cautious enough? Perhaps several factors led to a poor decision.

Write a brief analytical report to your instructor that describes the situation and outlines your analysis of why the failure occurred and how you can avoid making a similar mistake in the future. If you can't think of a significant mistake or failure that you're comfortable sharing with your instructor, write about a mistake that a friend or family member made (without revealing the person's identity or potentially embarrassing him or her).

**10-39. Message Strategies: Analytical Reports [LO-6]** Assume that you will have time for only one course next term. Identify the criteria you will use to decide which of several courses to take. (This is the yardstick approach mentioned in the chapter.)

**Your task:** List the pros and cons of four or five courses that interest you and use the selection criteria you identified to choose the one course that is best for you to take at this time. Write your report in memo format, addressing it to your academic adviser.

**10-40. Message Strategies: Analytical Reports [LO-6]** Imagine you are a consultant hired to improve the customer service of your campus bookstore.

**Your task:** Visit the bookstore and look critically at its operations. Then draft a letter that could be sent to the bookstore manager, offering recommendations that would help the store service customers more effectively, perhaps suggesting products it should carry, hours that it should remain open, or added services that it should make available to students. Be sure to support your recommendations.

**10-41. Message Strategies: Analytical Reports [LO-6]** Spurred in part by the success of numerous do-it-yourself (DIY) TV shows, homeowners across the country are redecorating, remodeling, and rebuilding. Many people are content with superficial changes, such as new paint or new accessories, but some are more ambitious. These homeowners want to move walls, add

**CASE TABLE 10.1 Rooms Most Frequently Remodeled by DIYers**

| Room | Percentage of Homeowners Surveyed Who Have Tackled or Plan to Tackle at Least a Partial Remodel |
|---|---|
| Kitchen | 60 |
| Bathroom | 48 |
| Home office/study | 44 |
| Bedroom | 38 |
| Media room/home theater | 31 |
| Den/recreation room | 28 |
| Living room | 27 |
| Dining room | 12 |
| Sun room/solarium | 8 |

*Source:* Pearson Education, Inc.

**CASE TABLE 10.2 Average Amount Spent on Remodeling Projects**

| Estimated Amount | Percentage of Surveyed Homeowners |
|---|---|
| Under $5k | 5 |
| $5k–$10k | 21 |
| $10k–$20k | 39 |
| $20k–$50k | 22 |
| More than $50k | 13 |

rooms, redesign kitchens, convert garages to home theaters—the big stuff.

Publishers try to create magazines that appeal to carefully identified groups of potential readers and the advertisers who'd like to reach them. The DIY market is already served by numerous magazines, but you see an opportunity in the homeowners who tackle the heavy-duty projects. Case Tables 10.1 through 10.3 summarize the results of some preliminary research you asked your company's research staff to conduct.

**Your task:** You think the data show a real opportunity for a "big projects" DIY magazine, although you'll need more extensive research to confirm the size of the market and refine the editorial direction of the magazine. Prepare a brief analytical report that presents the data you have, identifies the opportunity or opportunities you've found (suggest your own ideas, based on the data in the tables), and requests funding from the editorial board to pursue further research.

### Proposals

#### EMAIL SKILLS

**10-42. Message Strategies: Proposals [LO-7]** One of the banes of apartment living is those residents who don't care about the condition of their shared surroundings. They might leave trash all over the place, dent walls when they move furniture, spill food and beverages in common areas, destroy window screens, and otherwise degrade living conditions for everyone. Landlords obviously aren't thrilled about this behavior, either, because it raises the costs of cleaning and maintaining the facility.

**Your task:** Assume you live in a fairly large apartment building some distance from campus. Write an email proposal you could send to your landlord, suggesting that fostering a sense of stronger community among residents in your building might help reduce incidents of vandalism and neglect. Propose that the little-used storage area in the basement of the building be converted to a community room, complete with a simple kitchen and a large-screen television. By attending Super Bowl parties and other events there, residents could get to know one another and perhaps forge bonds that would raise the level of shared concern for their living environment. You can't offer any proof of this in advance, of course, but share your belief that a modest investment in this room could pay off long term in lower repair and maintenance costs. Moreover, it would be an attractive feature to entice new residents.

**CASE TABLE 10.3 Tasks Performed by Homeowner on a Typical Remodeling Project**

| Task | Percentage of Surveyed Homeowners Who Perform or Plan to Perform Most or All of This Task Themselves |
|---|---|
| Conceptual design | 90 |
| Technical design/architecture | 34 |
| Demolition | 98 |
| Foundation work | 62 |
| Framing | 88 |
| Plumbing | 91 |
| Electrical | 55 |
| Heating/cooling | 22 |
| Finish carpentry | 85 |
| Tile work | 90 |
| Painting | 100 |
| Interior design | 52 |

**10-43. Message Strategies: Proposals [LO-7]** Select a product you are familiar with and imagine you are the manufacturer trying to get a local retail outlet to carry it. Use the Internet and other resources to gather information about the product.

**Your task:** Write an unsolicited sales proposal in letter format to the owner (or manager) of the store, proposing that the item be stocked. Use the information you gathered to describe some of the product's features and benefits. Then make up some reasonable figures, highlighting what the item costs, what it can be sold for, and what services your company provides (return of unsold items, free replacement of unsatisfactory items, necessary repairs, and so on).

## Improve Your Grammar, Mechanics, and Usage

You can download the text of this assignment from **http://real-timeupdates.com/bce7**; click on Student Assignments and then click on Chapter 10. Improve Your Grammar, Mechanics, and Usage.

### Level 1: Self-Assessment—Dashes and Hyphens

Review Sections 2.7 and 2.8 in the Handbook of Grammar, Mechanics, and Usage and then complete the following 15 items.

For the following items, insert the required dashes (—) and hyphens (-).

**10-44.** Three qualities speed, accuracy, and reliability are desirable in any applicant to the data entry department.

**10-45.** A highly placed source explained the top secret negotiations.

**10-46.** The file on Marian Gephardt yes, we finally found it reveals a history of late payments.

**10-47.** They're selling a well designed machine.

**10-48.** A bottle green sports jacket is hard to find.

**10-49.** Argentina, Brazil, Mexico these are the countries we hope to concentrate on.

**10-50.** Only two sites maybe three offer the things we need.

**10-51.** How many owner operators are in the industry?

**10-52.** Your ever faithful assistant deserves without a doubt a substantial raise.

**10-53.** Myrna Talefiero is this organization's president elect.

**10-54.** Stealth, secrecy, and surprise those are the elements that will give us a competitive edge.

**10-55.** The charts are well placed on each page unlike the running heads and footers.

**10-56.** We got our small business loan an enormous advantage.

**10-57.** Ron Franklin do you remember him? will be in town Monday.

**10-58.** Your devil may care attitude affects everyone involved in the decision making process.

### Level 2: Workplace Applications

The following items may contain errors in grammar, capitalization, punctuation, abbreviation, number style, word division, and vocabulary. Rewrite each sentence, correcting all errors. If a sentence has no errors, write "Correct" for that number.

**10-59.** Commerce One helps its customer's to more efficiently lower administrative costs, improve order times, and to manage contract negotiations.

**10-60.** The intermodal bus vehicle seats up to 35 passengers, but is equipped with a 20 feet standardized container in the rear. The same container one sees on ships, trains and on planes.

**10-61.** "The American Dream of innovation, persistence, and a refusal to except the status quo has just created, in our opinion, Americas newest and most exciting company to watch," said James Gaspard President of Neoplan USA.

**10-62.** This new, transportation paradigm may have a global affect and the barriers to entry will be extremely costly too overcome.

**10-63.** Autobytel also owns and operates Carsmart.com and Autosite.com as well as AIC Automotive Information Center a provider of automotive marketing data and technology.

**10-64.** Mymarket.com offers a low cost high reward, entry into e-commerce not only for buyers but also suppliers.

**10-65.** Eclipse Aviation's main competitor are another start-up Safire Aircraft of west Palm Beach, Fl.

**10-66.** After identifying the factors that improve a industrial process, additional refining experiments must be conducted to confirm the results.

**10-67.** The fair labor standards Act regulates minimum wages, establishes overtime compensation, and it outlaws labor for children.

**10-68.** The Chinese government are supporting use of the Internet as a business tool because it is seen by it as necessary to enhance competitiveness.

**10-69.** At a certain point in a company's growth, the entrepreneur, who wants to control everything, can no longer keep up so they look mistakenly for a better manager and call that person a CEO.

**10-70.** City Fresh foods is paid by City health agencies to provide Ethnic food to the homebound "elderly" in the Boston Area.

**10-71.** Being in business since 1993, Miss Rosen has boiled down her life story into a 2-minute sound bight for sales prospects.

**10-72.** Anyone that wants to gain a new perspective on their product or service must cast aside one's own biases.

**10-73.** If I was Microsoft's Satya Nadella, I'd handle the Federal government's antitrust lawsuit much different.

### Level 3: Document Critique

The following document may contain errors in grammar, capitalization, punctuation, abbreviation, number style, word division, and vocabulary. As your instructor indicates, photocopy this page and correct all errors using standard proofreading marks (see Appendix C) or download the document and make the corrections in your word-processing software.

Memo
Date: March 14 2015
TO: Jeff Black and HR staff
FROM: Carrie andrews
Subject: Recruiting and hiring Seminar

As you all know the process of recruiting screening and hiring new employees might be a legal minefield. Because we don't have an inhouse lawyer to help us make every decision, its important for all of us to be aware of what actions are legally acceptible and what isn't. Last week I attended a American management Association seminar on this subject. I given enough useful information to warrant updating our online personnel handbook and perhaps developing a quick training session for all interviewing teams. First, heres a quick look at the things I learned.

**Avoiding Legal Mistakes**

1. How to write recruiting ads that accurately portray job openings and not discriminate
2. Complying with the Americans with Disabilities Act
3. How to use an employment agency effectively and safe (without risk of legal entanglements)

**How to Screen and Interview More Effectively**

1. How to sort through résumés more efficient (including looking for telltale signs of false information)
2. We can avoid interview questions that could get us into legal trouble
3. When and how to check criminal records

**Measuring Applicants**

1. Which type of preemployment tests have been proven most effective?
2. Which drug-testing issues and recommendations effect us as you can see the seminar addressed alot of important information. We covering the basic guidelines for much of this already; but a number of specific recommendations and legal concepts should be emphisized and underline.

It will take me a couple of weeks to get the personel handbook updated: but we don't have any immediate hiring plans anyway so that shouldn't be too much of a problem unless you think I should complete it sooner and then we can talk about that.

I'll keep the seminar handouts and my notes on my desk in case you want to peruse them.

After the handbook is updated by me, we can get together and decide whether we need to train the interviewing team members.

Although we have a lot of new information, what people need to be aware of can be highlighted and the new sections can be read as schedules allow, although they might be reluctant to do this and we can also talk about that later, at a time of your conveinence that you can select later.

If you have any questions in the mean-time; don't hesitate to email me or drop by for a chat.

## MyBCommLab

Go to **mybcommlab.com** for the following Assisted-graded writing questions:

**10-74.** Why must you be careful when using information from the Internet in a business report?

**10-75.** Why are unsolicited proposals more challenging to write than solicited proposals?

# Endnotes


**1.** "Writing a Compelling Executive Summary," Garage Technology Ventures website, accessed 21 April 2014, www.garage.com.
**2.** Courtland L. Bovée, Michael J. Houston, and John V. Thill, *Marketing*, 2nd ed. (New York: McGraw-Hill, 1995), 194–196.
**3.** Legal-Definitions.com, accessed 17 December 2003, www.legal-definitions.com.
**4.** Lynn Quitman Troyka, *Simon & Schuster Handbook for Writers,* 6th ed. (Upper Saddle River, N.J.: Prentice Hall, 2002), 481.
**5.** AllTheWeb.com advanced search page, accessed 27 August 2005, www.alltheweb.com; Google advanced search page, accessed 27 August 2005, www.google.com; Yahoo! advanced search page, accessed 27 August 2005, www.yahoo.com.
**6.** Christina Warren, "Yolink Helps Web Researchers Search Behind Links," Mashable, 24 July 2010, http://mashable.com.
**7.** Naresh K. Malhotra, *Basic Marketing Research* (Upper Saddle River, N.J.: Prentice Hall, 2002), 314–317; "How to Design and Conduct a Study," *Credit Union Magazine,* October 1983, 36–46.
**8.** A. B. Blankenship and George Edward Breen, *State of the Art Marketing Research* (Chicago: NTC Business Books, 1993), 136.
**9.** Jakob Nielsen, "How Users Read on the Web," accessed 11 November 2004, www.useit.com/alertbox/9710a.html.
**10.** Reid Goldsborough, "Words for the Wise," *Link-Up*, September–October 1999, 25–26.
**11.** Julie Rohovit, "Computer Eye Strain: The Dilbert Syndrome," Virtual Hospital website, accessed 9 November 2004, www.vh.org.
**12.** Nick Usborne, "Two Pillars of a Successful Site," *Excess Voice,* May 2004, www.excessvoice.com.
**13.** Shel Holtz, "Writing for the Wired World," training manual, International Association of Business Communicators, 1999, 6–9.
**14.** Holtz, "Writing for the Wired World," 28–29.
**15.** SXSW website, accessed 27 July 2010, http://sxsw.com; Catherine Holahan and Spencer E. Ante, "SXSW: Where Tech Mingles with Music," *BusinessWeek*, 7 March 2008, www.businessweek.com.

# 11 Writing and Completing Reports and Proposals

## LEARNING OBJECTIVES

After studying this chapter, you will be able to

1. List the topics commonly covered in the introduction, body, and close of informational reports, analytical reports, and proposals
2. Identify six guidelines for drafting effective website content and offer guidelines for becoming a valuable wiki contributor
3. Discuss six principles of graphic design that can improve the quality of your visuals and identify the major types of business visuals
4. Summarize the four tasks involved in completing business reports and proposals



## Communication Matters . . .

"It is easy to slip into unnatural corporate-speak, particularly when under pressure to communicate a complex issue quickly. This language is an immediate turn-off. Even if you have to explain a technical issue, don't forget you are communicating to fellow human beings."[1]
—Tania Menegatti, human resources consultant

Focusing on the content of your longer business documents is not only natural but necessary, because doing so helps ensure complete, correct information. However, once you have the technical content in place, you need to stand back and view the document from the perspective of your audience—the people you expect to read and act on the information. Is your message clear, compelling, and concise? Is it something your intended reader could be expected to read and understand? Follow Tania Menegatti's example whenever you're writing and completing reports and proposals: Even with the most complex or technical documents, remember that another human being is at the receiving end of your communication efforts.

No matter now complex or technical the content of a report or proposal might be, keep the business needs of your readers in mind.
*Source:* Yuri Arcurs/Shutterstock

# Writing Reports and Proposals

1 LEARNING OBJECTIVE
List the topics commonly covered in the introduction, body, and close of informational reports, analytical reports, and proposals.

This chapter focuses on writing and completing reports, along with creating content for websites, collaborating on wikis, and creating graphical elements to illustrate messages of all kinds. All the writing concepts and techniques you learned in Chapter 4 apply to the longer format of business reports. However, the length and complexity of reports call for special attention to several issues, starting with adapting to your audience.

## ADAPTING TO YOUR AUDIENCE

The "you" attitude is especially important with long or complex reports because they demand a lot from readers.

Reports and proposals can put heavy demands on your readers, so the "you" attitude is especially important with these long messages. In general, try to strike a balance between being overly informal (which can be perceived as trivializing important issues) and overly formal (which can put too much distance between writer and reader). If you know your readers reasonably well and your report is likely to meet with their approval, you can generally adopt an informal tone. To make your tone less formal, speak to readers in the first person, refer to them as *you*, and refer to yourself as *I* (or *we* if there are multiple report authors).

You can adjust the formality of your writing through your word choices and writing style.

To make your tone more formal, use the impersonal journalism style: Emphasize objectivity, avoid personal opinions, and build your argument on provable facts (see Figure 11.1). Eliminate all personal pronouns (including *I*, *you*, *we*, *us*, and *our*). Avoid humor, and be careful with your use of similes, metaphors, and particularly colorful adjectives or adverbs. However, you don't need to make the writing monotonous. For example, you can still create interest by varying the types of sentences to create a pleasing rhythm.

Take into account that communicating with people in other cultures often calls for more formality in reports, both to respect cultural preferences and to reduce the risk of miscommunication. Informal elements such as humor and casual language tend to translate poorly from one culture to another.

## DRAFTING REPORT CONTENT

You can simplify report writing by breaking the job into three main sections: an introduction (or opening), a body, and a close. Table 11.1 on page 311 summarizes the goals of each section and lists elements to consider including in each as well. You can use this table as a handy reference whenever you need to write a report in school or on the job.

At a minimum, an effective *introduction* accomplishes these four tasks:

The introduction needs to put the report in context for the reader, introduce the subject, preview the main idea, and establish the tone of the document.

- It helps the reader understand the context of the report by tying it to a problem or an assignment.
- It introduces the subject matter and indicates why it is important.
- It previews the main idea (if you're using the direct approach).
- It establishes the tone and the writer's relationship with the audience.

The body of your report presents, analyzes, and interprets the information you gathered during your investigation.

The *body* presents, analyzes, and interprets the information gathered during your investigation and supports your recommendations or conclusions. The length and content of the body can vary widely based on the subject matter.

The *close* has three important functions:

Your close is often the last opportunity to get your message across, so make it clear and compelling.

- It summarizes your key points.
- It emphasizes the benefits to the reader if the document suggests a change or some other course of action.
- It brings all the action items together in one place.

To serve the needs of your readers and build your reputation as a careful and insightful professional, make sure your content in every section is accurate, complete, balanced, clear, and logical. As always, be sure to properly document all your sources (see Appendix B).

Help your readers find what they want and stay on track with headings or links, transitions, previews, and reviews.

In addition, help today's time-pressed readers find what they're looking for and stay on track as they navigate through your documents. First, write clear headings and subheadings that let readers follow the structure of your document and help them pick up the key points


Long and somewhat rigorous sentences help give the report its formal tone. For a more consumer-oriented publication, this writing could certainly be simplified.

Eating and physical activity patterns that are focused on consuming fewer calories, making informed food choices, and being physically active can help people attain and maintain a healthy weight, reduce their risk of chronic disease, and promote overall health. The *Dietary Guidelines for Americans, 2010* exemplifies these strategies through recommendations that accommodate the food preferences, cultural traditions, and customs of the many and diverse groups who live in the United States.

By law (Public Law 101-445, Title III, 7 U.S.C. 5301 et seq.), *Dietary Guidelines for Americans* is reviewed, updated if necessary, and published every 5 years. The U.S. Department of Agriculture (USDA) and the U.S. Department of Health and Human Services (HHS) jointly create each edition. *Dietary Guidelines for Americans, 2010* is based on the *Report of the Dietary Guidelines Advisory Committee on the Dietary Guidelines for Americans, 2010* and consideration of Federal agency and public comments.

Dietary Guidelines recommendations traditionally have been intended for healthy Americans ages 2 years and older. However, *Dietary Guidelines for Americans, 2010* is being released at a time of rising concern about the health of the American population. Poor diet and physical inactivity are the most important factors contributing to an epidemic of overweight and obesity affecting men, women, and children in all segments of our society. Even in the absence of overweight, poor diet and physical inactivity are associated with major causes of morbidity and mortality in the United States. Therefore, the *Dietary Guidelines for Americans, 2010* is intended for Americans ages 2 years and older, including those at increased risk of chronic disease.

*Dietary Guidelines for Americans, 2010* also recognizes that in recent years nearly 15 percent of American households have been unable to acquire adequate food to meet their needs.[1] This dietary guidance can help them maximize the nutritional content of

A less-formal report might've said something along the lines of "Poor diet and physical inactivity are killing U.S. citizens" instead of the more formal (and more precise) "are associated with major causes of morbidity and mortality."

This paragraph mentions the troubling statistic that 15 percent of U.S. households can't afford to meet basic nutritional requirements, but because the report is presenting dietary recommendations and not public policy statements about economics or other issues, the tone is objective and dispassionate.

1. Nord M, Coleman-Jensen A, Andrews M, Carlson S. Household food security in the United States, 2009. Washington (DC): U.S. Department of Agriculture, Economic Research Service. 2010 Nov. Economic Research Report No. ERR-108. Available from http://www.ers.usda.gov/publications/err108.

viii DIETARY GUIDELINES FOR AMERICANS, 2010

***(continued)***

**Figure 11.1 Achieving the Appropriate Tone for a Report**

This report excerpt (part of the executive summary of the *Dietary Guidelines for Americans* published by the U.S. Department of Agriculture and the U.S. Department of Health and Human Services) uses a number of techniques to create a formal tone. This is a formal policy document whose intended readers are educators, government regulators, and others charged with using the information to help inform consumers. If the document had been written with consumers in mind, you can imagine how the tone might have been lighter and less formal.

of your message. Second, use plenty of transitions to tie together ideas and show how one thought is related to another. Third, include *preview sections* to help readers get ready for new information and *review sections* after a body of material to summarize key points.

Finally, make the process as easy on yourself as possible by taking advantage of all available productivity tools. For example, the size and complexity of many reports make templates and style sheets particularly helpful. If you include graphics, spreadsheets, or database records produced in other programs, make sure you know how your writing software handles the file connection. You might have the choice to maintain a "live" connection

Look for ways to use technology to reduce the mechanical work involved in writing long reports.

This is an example of a sentence that is precise and uses language appropriate for the purpose of this report. In contrast, a document aimed primarily at consumers might have said "We've converted the latest nutritional insights into recommendations for healthy eating."

their meals. Many other Americans consume less than optimal intake of certain nutrients even though they have adequate resources for a healthy diet. This dietary guidance and nutrition information can help them choose a healthy, nutritionally adequate diet.

The intent of the Dietary Guidelines is to summarize and synthesize knowledge about individual nutrients and food components into an interrelated set of recommendations for healthy eating that can be adopted by the public. Taken together, the Dietary Guidelines recommendations encompass two overarching concepts:

- **Maintain calorie balance over time to achieve and sustain a healthy weight.** People who are most successful at achieving and maintaining a healthy weight do so through continued attention to consuming only enough calories from foods and beverages to meet their needs and by being physically active. To curb the obesity epidemic and improve their health, many Americans must decrease the calories they consume and increase the calories they expend through physical activity.
- **Focus on consuming nutrient-dense foods and beverages.** Americans currently consume too much sodium and too many calories from solid fats, added sugars, and refined grains.[2] These replace nutrient-dense foods and beverages and make it difficult for people to achieve recommended nutrient intake while controlling calorie and sodium intake. A healthy eating pattern limits intake of sodium, solid fats, added sugars, and refined grains and emphasizes nutrient-dense foods and beverages—vegetables, fruits, whole grains, fat-free or low-fat milk and milk products,[3] seafood, lean meats and poultry, eggs, beans and peas, and nuts and seeds.

A basic premise of the Dietary Guidelines is that nutrient needs should be met primarily through consuming foods. In certain cases, fortified foods and dietary supplements may be useful in providing one or more nutrients that otherwise might be consumed in less than recommended amounts. Two eating patterns that embody the Dietary Guidelines are the USDA Food Patterns and their vegetarian adaptations and the DASH (Dietary Approaches to Stop Hypertension) Eating Plan.

In a less-formal report, the authors might have written "One of our basic premises is that nutrient needs should be met primarily through consuming foods" or even "You should meet your nutrient needs by eating food, not by taking supplements." However, to maintain a formal tone, they avoid both first and second person usage.

A healthy eating pattern needs not only to promote health and help to decrease the risk of chronic diseases, but it also should prevent foodborne illness. Four basic food safety principles (Clean, Separate, Cook, and Chill) work together to reduce the risk of foodborne illnesses. In addition, some foods (such as milks, cheeses, and juices that have not been pasteurized, and undercooked animal foods) pose high risk for foodborne illness and should be avoided.

The information in the *Dietary Guidelines for Americans* is used in developing educational materials and aiding policymakers in designing and carrying out nutrition-related programs, including Federal food, nutrition education, and information programs. In addition, the *Dietary Guidelines for Americans* has the potential to offer authoritative statements as provided for in the Food and Drug Administration Modernization Act (FDAMA).

The following are the *Dietary Guidelines for Americans, 2010* Key Recommendations, listed by the chapter in which they are discussed in detail. These Key Recommendations are the most important in terms of their implications for improving public health.[4] To get the full benefit, individuals should carry out the Dietary Guidelines recommendations in their entirety as part of an overall healthy eating pattern.

2. Added sugars: Caloric sweeteners that are added to foods during processing, preparation, or consumed separately. Solid fats: Fats with a high content of saturated and/or *trans* fatty acids, which are usually solid at room temperature. Refined grains: Grains and grain products missing the bran, germ, and/or endosperm; any grain product that is not a whole grain.
3. Milk and milk products also can be referred to as dairy products.
4. Information on the type and strength of evidence supporting the Dietary Guidelines recommendations can be found at http://www.nutritionevidencelibrary.gov.

DIETARY GUIDELINES FOR AMERICANS, 2010 ix

**Figure 11.1 Achieving the Appropriate Tone for a Report (*continued*)**

with these included files so that any changes in the original automatically show up in your report. And be sure to explore your media and channel options. Video clips, animation, presentation slides, *screencasts* (recordings of on-screen activity), and other media elements can enhance the communication and persuasion powers of the written word.

## DRAFTING PROPOSAL CONTENT

In an unsolicited proposal, your introduction needs to convince readers that a problem or an opportunity exists.

All of the guidelines for writing reports apply to proposals as well, but these persuasive messages have some unique considerations. As Chapter 10 notes, the most important factor is whether the proposal is solicited or unsolicited, because that can affect your organization, content, and tone.

The general purpose of any proposal is to persuade readers to do something, so your writing approach should be similar to that used for persuasive messages, perhaps including

TABLE 11.1 **Content Elements to Consider for Reports and Proposals**

| Reports | Proposals |
|---|---|
| **Introduction:** Establish the context, identify the subject, preview main ideas (if using the direct approach), establish tone and reader relationship.<br>• **Authorization.** Reiterate who authorized the report, if applicable.<br>• **Problem/purpose.** Explain the reason for the report's existence and what the report will achieve.<br>• **Scope.** Describe what will and won't be covered in the report.<br>• **Background.** Review historical conditions or factors that led up to the report.<br>• **Sources and methods.** Discuss the primary and secondary sources consulted and methods used.<br>• **Definitions.** List terms and their definitions, including any terms that might be misinterpreted. Terms may also be defined in the body, explanatory notes, or glossary.<br>• **Limitations.** Discuss factors beyond your control that affect report quality (but do not use this as an excuse for poor research or a poorly written report).<br>• **Report organization.** Identify the topics to be covered and in what order. | **Introduction:** Identify the problem you intend to solve or the opportunity you want to pursue.<br>• **Background or statement of the problem.** Briefly review the situation at hand, establish a need for action, and explain how things could be better. In unsolicited proposals, convince readers that a problem or an opportunity exists.<br>• **Solution.** Briefly describe the change you propose, highlighting your key selling points and their benefits to show how your proposal will solve the reader's problem.<br>• **Scope.** State the boundaries of the proposal—what you will and will not do.<br>• **Report organization.** Orient the reader to the remainder of the proposal, and call attention to the major divisions of thought. |
| **Body:** Present relevant information, and support your recommendations or conclusions.<br>• **Explanations.** Give complete details of the problem, project, or idea.<br>• **Facts, statistical evidence, and trends.** Lay out the results of studies or investigations.<br>• **Analysis of action.** Discuss potential courses of action.<br>• **Pros and cons.** Explain advantages, disadvantages, costs, and benefits of a particular course of action.<br>• **Procedures.** Outline steps for a process.<br>• **Methods and approaches.** Discuss how you've studied a problem (or gathered evidence) and arrived at your solution (or collected your data).<br>• **Criteria.** Describe the benchmarks for evaluating options and alternatives.<br>• **Conclusions and recommendations.** Discuss what you believe the evidence reveals and what you propose should be done about it.<br>• **Support.** Give the reasons behind your conclusions or recommendations. | **Body:** Give complete details on the proposed solution, and describe anticipated results.<br>• **Facts and evidence to support your conclusions.** Give complete details of the proposed solution and anticipated results.<br>• **Proposed approach.** Describe your concept, product, or service. Stress reader benefits, and emphasize any advantages you have over your competitors.<br>• **Work plan.** Describe how you'll accomplish what must be done (unless you're providing a standard, off-the-shelf item). Explain the steps you'll take, their timing, the methods or resources you'll use, and the person(s) responsible. State when work will begin, how it will be divided into stages, when you'll finish, and whether follow-up will be needed.<br>• **Statement of qualifications.** Describe your organization's experience, personnel, and facilities—relating it all to readers' needs. Include a list of client references.<br>• **Costs.** Prove that your costs are realistic—break them down so that readers can see the costs of labor, materials, transportation, travel, training, and other categories. |
| **Close:** Summarize key points, emphasize benefits of any recommendations, list action items; label as "Summary" or "Conclusions and Recommendations."<br>• **For direct approach.** Summarize key points (except in short reports), listing them in the order in which they appear in the body. Briefly restate your conclusions or recommendations, if appropriate.<br>• **For indirect approach.** If you haven't done so at the end of the body, present your conclusions or recommendations.<br>• **For motivating action.** Spell out exactly what should happen next, and provide a schedule with specific task assignments. | **Close:** Summarize key points, emphasize the benefits and advantages of your proposed solution, ask for a decision from the reader.<br>• **Review of argument.** Briefly summarize the key points.<br>• **Review of reader benefits.** Briefly summarize how your proposal will help the reader.<br>• **Review of the merits of your approach.** Briefly summarize why your approach will be more effective than alternatives.<br>• **Restatement of qualifications.** For external proposals, briefly reemphasize why you and your firm should do the work.<br>• **Request.** Ask for a decision from the reader. |

the use of the AIDA model to gain attention, build interest, create desire, and motivate action. Here are some additional strategies to strengthen your argument:[2]

- Demonstrate your knowledge.
- Provide concrete information and examples.
- Research the competition so you know what other proposals your audience is likely to read.
- Demonstrate that your proposal is appropriate and feasible for your audience.
- Relate your product, service, or personnel to the reader's unique needs.

Readers understand that a proposal is a persuasive message, so they're willing to accommodate a degree of promotional emphasis in your writing—as long as it is professional and focused on their needs.

Moreover, make sure your proposal is error-free, visually inviting, and easy to read. Readers will prejudge the quality of your products, services, or capabilities by the quality of your proposal. Errors, omissions, and inconsistencies will work against you—and might even cost you important career and business opportunities.

Consider using proposal-writing software if you and your company need to submit proposals as a routine part of doing business. These programs can automatically personalize proposals, ensure proper structure (making sure you don't forget any sections, for instance), organize storage of all your boilerplate text, integrate contact information from sales databases, scan RFPs to identify questions (and even assign them to content experts), and fill in preliminary answers to common questions from a centralized knowledge base.[3]

# Writing for Websites and Wikis

**2 LEARNING OBJECTIVE** Identify six guidelines for drafting effective website content and offer guidelines for becoming a valuable wiki contributor.

In addition to standalone reports and proposals, you may be asked to write in-depth content for websites or to collaborate on a wiki. The basic principles of report writing apply to both formats, but each has some unique considerations as well.

## DRAFTING WEBSITE CONTENT

Major sections on websites, particularly those that are fairly static (unlike, say, a blog) function in much the same way as reports. The skills you've developed for report writing adapt easily to this environment, as long as you keep a few points in mind:

Readers don't approach websites and online reports in the same way they approach printed documents, so your approach as a writer needs to change as well.

- Because readers can be skeptical of online content, take special care to build trust with your intended audiences. Make sure your content is accurate, current, complete, and authoritative.
- As much as possible, adapt your content for a global audience. Translating content is expensive, so some companies compromise by *localizing* the homepage while keeping the deeper, more detailed content in its original language.
- In an environment that presents many reading challenges, compelling, reader-oriented content is a key to success.[4] Wherever you can, use the *inverted pyramid* style, in which you cover the most important information briefly at first and then gradually reveal successive layers of detail—letting readers choose to see those additional layers if they want to.
- Present your information in a concise, skimmable format (see Figure 11.2). Effective websites use a variety of means to help readers skim pages quickly, including lists, use of color and boldface, informative headings, and helpful summaries that give readers the option of learning more if they choose to do so.
- Write effective links that serve for both site navigation and content skimming. Above all, clearly identify where a link will take readers. Don't resort to cute wordplay that obscures the content, and don't force readers to click through and try to figure out where they're going.
- Make your website a "living" document by regularly adding fresh content and deleting content that is out of date or no longer relevant to your target audience. Over time, websites can accumulate many pages of outdated information that get in the way and send a negative message about the company's efforts to stay on top of user needs.[5]

## COLLABORATING ON WIKIS

As Chapter 2 points out, using wikis is a great way for teams and other groups to collaborate on writing projects, from brief articles to long reports and reference works. Although wikis have many benefits, they do require a unique approach to writing. To be a valuable wiki contributor, keep these points in mind:[6]

Effective collaboration on wikis requires a unique approach to writing.

- Let go of traditional expectations of authorship, including individual recognition and control.
- Encourage all team members to improve each other's work.

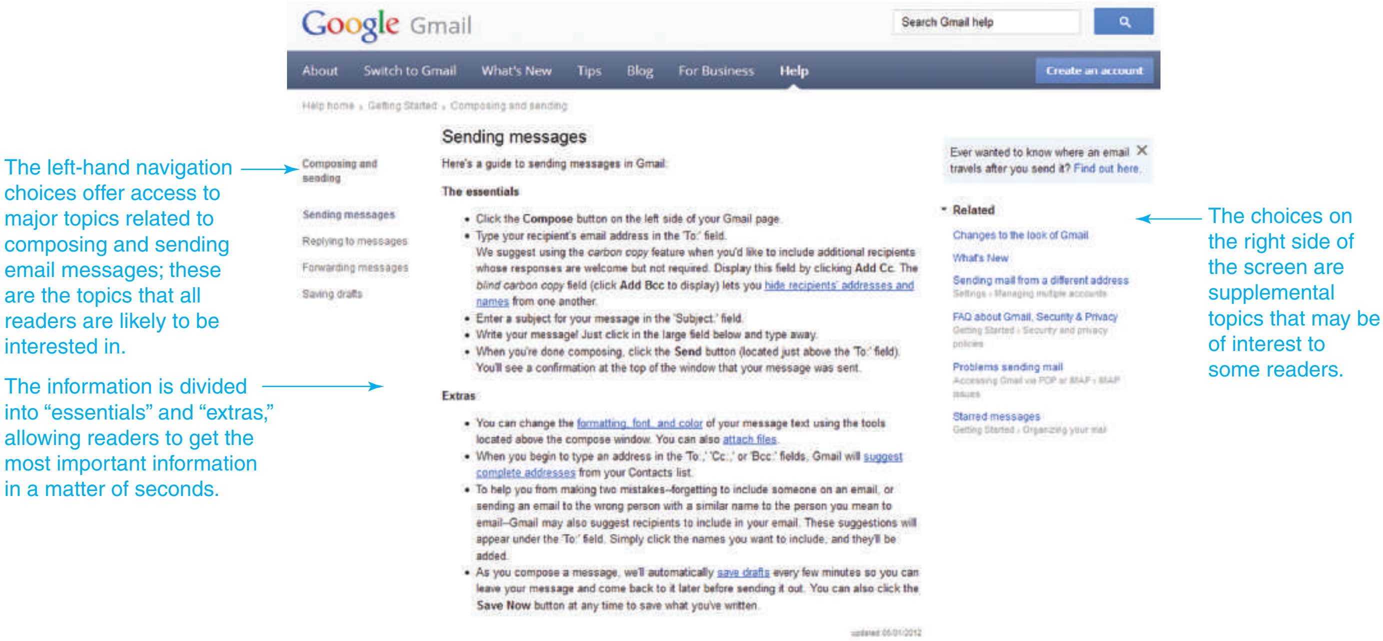


**Figure 11.2 Writing for the Web**
This page from the Google Help feature for Gmail demonstrates several important points about effective web writing.

- Use page templates and other formatting options to make sure your content matches the rest of the wiki.
- Use the separate editing and discussion capabilities appropriately.
- Take advantage of the *sandbox*, if available; this is a "safe," nonpublished section of the wiki where team members can practice editing and writing.

Wikis usually have guidelines to help new contributors integrate their work into the group's ongoing effort. Be sure to read and understand these guidelines, and don't be afraid to ask for help.

If you are creating a new wiki, think through your long-term purpose carefully, just as you would with a new blog or podcast channel. Doing so will help you craft appropriate guidelines, editorial oversight, and security policies. For instance, the PlayStation development team at Sony uses a wiki to keep top managers up to date on new products; because this information is highly confidential, access to the wiki is tightly controlled.[7]

Before you add new pages to a wiki, figure out how the material fits with the existing content.

If you are adding a page or an article to an existing wiki, figure out how this new material fits in with the existing organization. Also, learn the wiki's preferred style for handling incomplete articles. For example, on the wiki that contains the user documentation for the popular WordPress blogging software, contributors are discouraged from adding new pages until the content is "fairly complete and accurate."[8]

If you are revising or updating an existing wiki article, use the checklist on page 154 in Chapter 5 to evaluate the content before you make changes. If you don't agree with published content and plan to revise it, you can use the wiki's discussion facility to share your concerns with other contributors. The wiki environment should encourage discussions and even robust disagreements, as long as everyone remains civil and respectful.

## Illustrating Your Reports with Effective Visuals

**3 LEARNING OBJECTIVE** Discuss six principles of graphic design that can improve the quality of your visuals, and identify the major types of business visuals.

Well-designed visual elements can enhance the communication power of textual messages and, in some instances, even replace textual messages. Generally speaking, in a given amount of time, effective images can convey much more information than text.[9] Using pictures is also a helpful way to communicate with multilingual audiences.

Carefully crafted visuals enhance the power of your words.

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**Understand the basics of perception**

This overview of the process of perception highlights the role emotions plays in how we perceive the world around us. Go to **http://real-timeupdates.com/bce7.** Under "Students," click on "Learn More."

Given the importance of visuals in today's business environment, **visual literacy**—the ability (as a sender) to create effective images and (as a receiver) to correctly interpret visual messages—has become a key business skill.[10] Even without any formal training in design, being aware of the following six principles will help you be a more effective visual communicator:

Visual literacy is the ability to create effective images and to interpret images correctly.

Pay close attention to consistency, contrast, balance, emphasis, convention, and simplicity.

- **Consistency.** Think of consistency as *visual parallelism*, similar to textual parallelism that helps audiences understand and compare a series of ideas.[11] You can achieve visual parallelism through the consistent use of color, shape, size, texture, position, scale, or typeface.
- **Contrast.** To emphasize differences, depict items in contrasting colors, such as red and blue or black and white. To emphasize similarities, make color differences more subtle.
- **Balance.** Visual balance can be either *formal*, in which the elements in the images are arranged symmetrically around a central point or axis, or *informal*, in which elements are not distributed evenly, but stronger and weaker elements are arranged in a way that achieves an overall effect of balance.[12] Formal balance tends to feel calming and serious, whereas informal balance tends to feel dynamic and engaging (which is why most advertising uses this approach, for example).
- **Emphasis.** Audiences usually assume that the dominant element in a design is the most important, so make sure that the visually dominant element really does represent the most important information.
- **Convention.** Just as written communication is guided by spelling, grammar, punctuation, and usage conventions, visual communication is guided by generally accepted rules or conventions that dictate virtually every aspect of design.[13] In every culture, for instance, certain colors and shapes have specific meanings.
- **Simplicity.** When you're designing graphics for your documents, limit the number of colors and design elements and take care to avoid *chartjunk*—decorative elements that clutter documents without adding any relevant information.[14] Think carefully about using some of the chart features available in your software, too. Many of these features can actually get in the way of effective visual communication.[15] For example, three-dimensional bar charts, cones, and pyramids can look appealing, but the third dimension usually adds no additional information and can be visually deceiving as well.[16]

MOBILE APPS

Instagram has become wildly popular for personal photos, but many companies use the photo-sharing service for business communication as well.

## CHOOSING THE RIGHT VISUAL FOR THE JOB

You have many types of visuals to choose from, and each is best suited to particular communication tasks.

After you've identified which points would benefit most from visual presentation, your next decision is to choose the types of visuals to use. As you can see in Figure 11.3, you have many choices for business graphics. For certain kinds of information, the decision is usually obvious. If you want to present a large set of numeric values or detailed textual information, for example, a table is the obvious choice in most cases. Also, certain visuals are commonly used for certain applications; so, for example, your audience is likely to expect line charts and bar charts to show trends. (Note that *chart* and *graph* are used interchangeably for most of the display formats discussed here.)

### Tables

Printed tables can display extensive amounts of data, but tables for online display and electronic presentations need to be simpler.

When you need to present detailed, specific information, choose a **table**, a systematic arrangement of data in columns and rows. Tables are ideal when your audience needs information that would be either difficult or tedious to handle in the main text. Most tables contain the standard parts illustrated in Figure 11.4 on page 316. Follow these guidelines to create clear, effective tables:

- Use common, understandable units and clearly identify them: dollars, percentages, price per ton, and so on.
- Express all items in a column in the same unit and round off for simplicity, if doing so doesn't distort the meaning.
- Label column headings clearly and use subheads if necessary.

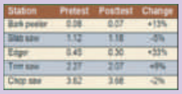
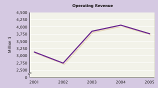
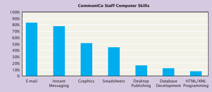
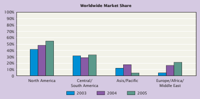
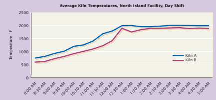
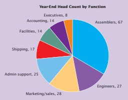
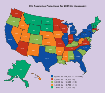
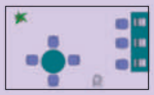
| Communication Challenge | Effective Visual Choice |
|---|---|
| **Presenting Data** | |
| To present individual, exact values | Table  |
| To show trends in one or more variables, or the relationship between those variables, over time | Line chart, bar chart     |
| To compare two or more sets of data | Bar chart, line chart     |
| To show frequency or distribution of parts in a whole | Pie chart   |
| **Presenting Information, Concepts, and Ideas** | |
| To show geographic relationships or comparisons | Map  |
| To illustrate processes or procedures | Flowchart, diagram  |
| To show conceptual or spatial relationships (simplified) | Drawing  |
| To tell a data-driven story visually | Infographic   |
| To show spatial relationships (realistic) | Photograph  |
| To show processes, transformations, and other activities | Animation, video   |

**Figure 11.3 Selecting the Best Visual**
You often have more than one option for communicating data and information visually; choose the best visual for each situation based on audience needs, the medium you'll use for your report, and your graphics capabilities.
*Source:* Hamik/Shutterstock; Yarygin/Shutterstock.

- Separate columns or rows with lines, extra space, or colors to make the table easy to follow. Make sure the intended reading direction—down the columns or across the rows—is obvious, too.
- Keep online tables small enough to read comfortably on screen.
- Document the source of data using the same format as a text footnote (see Appendix B).

## Line Charts and Surface Charts

A **line chart** (see Figure 11.5 on the next page) illustrates trends over time or plots the relationship of two variables. In line charts that show trends, the vertical, or *y*, axis shows the amount, and the horizontal, or *x*, axis shows the time or other quantity against which

Line charts are commonly used to show trends over time or the relationship between two variables.

| | Multicolumn Heading | | | Single-Column Heading |
|---|---|---|---|---|
| | Column Subheading | Column Subheading | Column Subheading | |
| Row Heading | xxx | xxx | xxx | xxx |
| Row Heading | xxx | xxx | xxx | xxx |
| *Row Subheading* | xxx | xxx | xxx | xxx |
| *Row Subheading* | xxx | xxx | xxx | xxx |
| Row Heading | xxx | xxx | xxx | xxx |
| Row Heading | xxx | xxx | xxx | xxx |
| TOTALS | xxx | xxx | xxx | xxx |

MyBCommLab Apply Figure 11.4's key concepts by going to **mybcommlab.com**

**Figure 11.4 Parts of a Table**
Here are the standard parts of a table. No matter which design you choose, make sure the layout is clear and the individual rows and columns are easy to follow.

the amount is being measured. You can plot just a single line or overlay multiple lines to compare different entities.

A **surface chart**, also called an **area chart**, is a form of line chart that shows a cumulative effect; all the lines add up to the top line, which represents the total (see Figure 11.6). This type of chart helps you illustrate changes in the composition of something over time. When preparing a surface chart, put the most significant line at the bottom and move up toward the least significant.

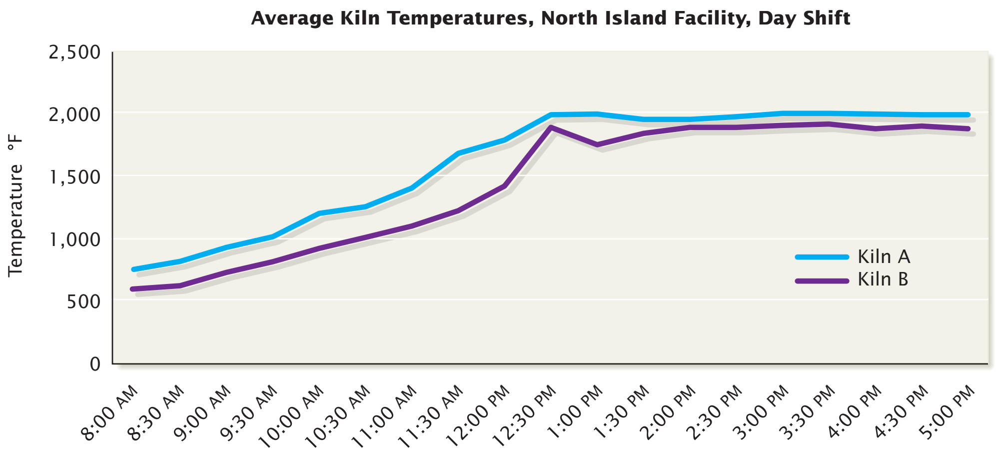



**Figure 11.5 Line Chart**
This two-line chart compares the temperatures measured inside two cement kilns every half hour from 8:00 A.M. to 5:00 P.M.

## Bar Charts and Pie Charts

Bar charts can show a variety of relationships among two or more variables.

A **bar chart** portrays numbers with the height or length of its rectangular bars, making a series of numbers easy to grasp quickly. Bars can be oriented horizontally or vertically (in which case they are sometimes referred to as *column charts*). Bar charts are particularly valuable when you want to show or compare quantities over time. As the charts in Figure 11.7 suggest, bar charts can appear in various forms. Specialized bar charts such as *timelines* and *Gantt charts* are used often in project management, for example.

Pie charts are used frequently in business reports, but in many instances they are not as helpful to readers as bar charts and other types of visuals would be.

A **pie chart** is a commonly used tool for showing how the parts of a whole are distributed. Although pie charts are popular and can quickly highlight the dominant parts of a whole, they are often not as effective as bar charts or tables. For example, comparing percentages accurately is often difficult with a pie chart but can be fairly easy with a bar chart (see Figure 11.8 on page 319). Making pie charts easier to read with accuracy can require labeling each slice with data values, in which case a table might serve the purpose more effectively.[17]

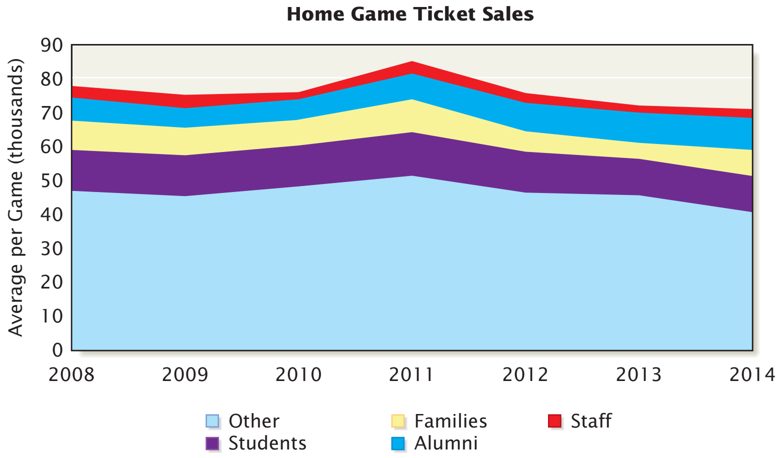
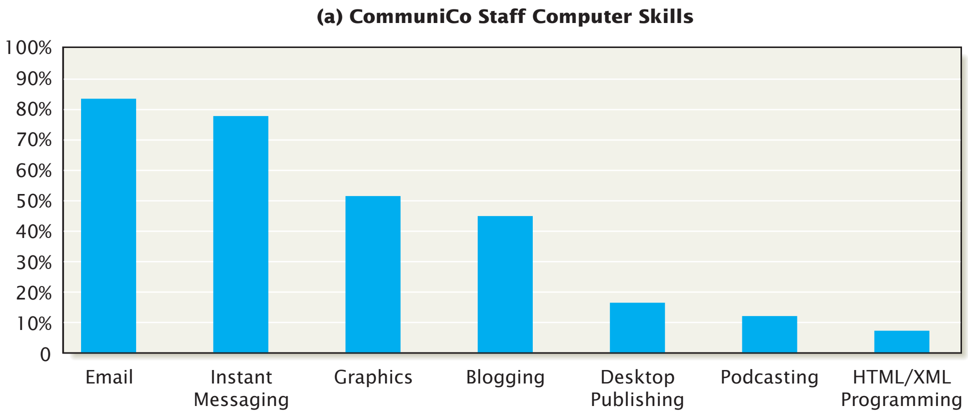



**Figure 11.6 Surface Chart**
Surface or area charts can show a combination of trends over time and the individual contributions of the components of a whole.

## Data Visualization

Conventional charts and graphs are limited in several ways: Most types can show only a limited number of data points before becoming too cluttered to interpret, they often can't show complex relationships among data points, and they can represent only numeric data.

Data visualization tools can overcome the limitations of conventional charts and other display types.



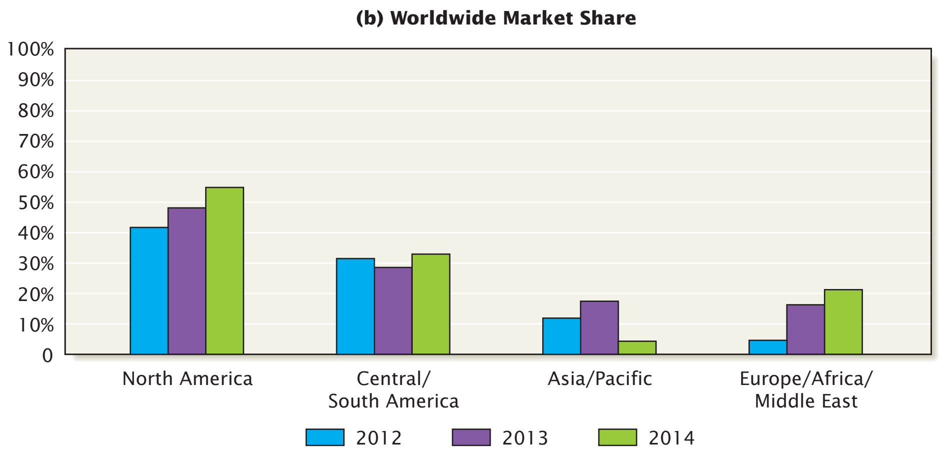
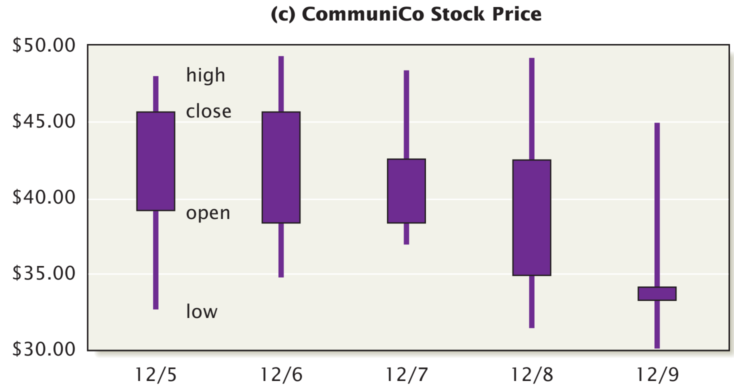
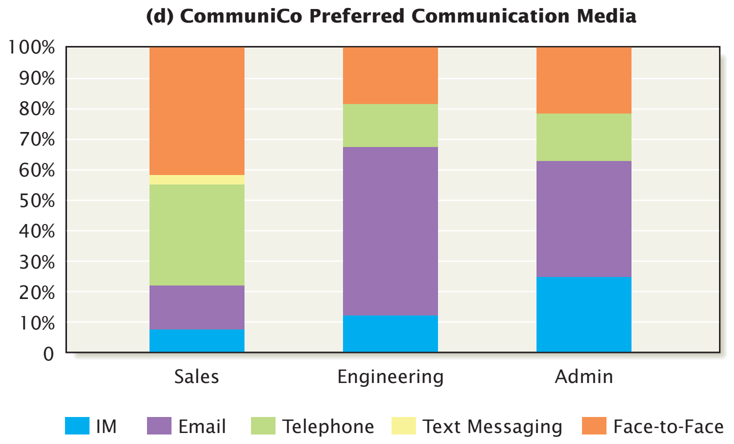
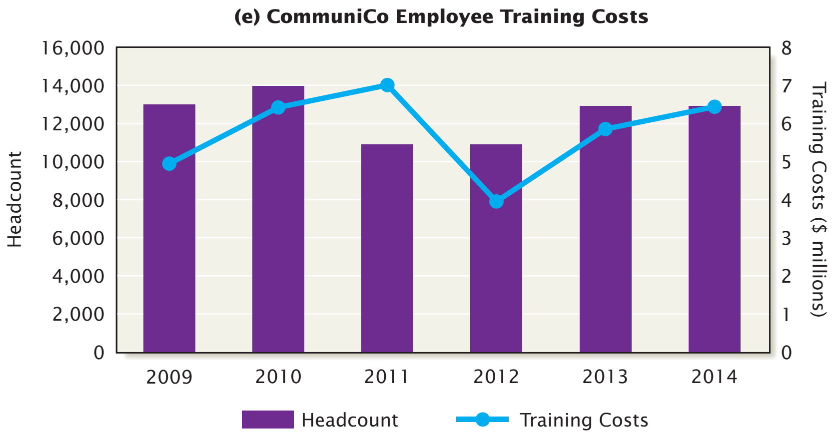




**Figure 11.7 The Versatile Bar Chart** ***(continued)***
Here are six of the dozens of variations possible with bar charts: singular (11.7a), grouped (11.7b), deviation (11.7c), segmented (11.7d), combination (11.7e), and paired (11.7f).



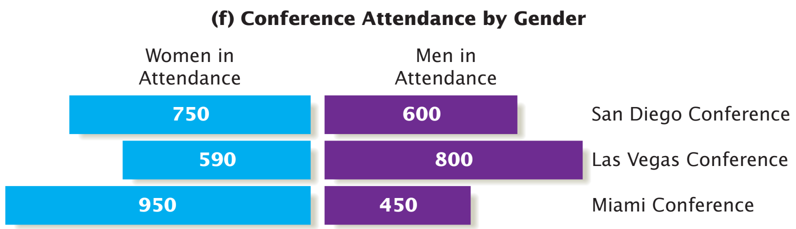
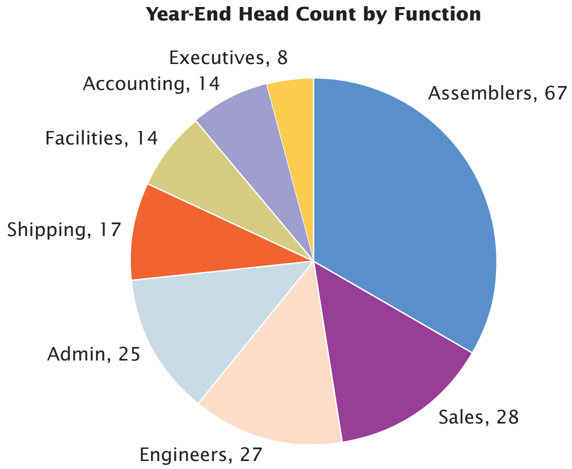




**Figure 11.7** **The Versatile Bar Chart (*continued*)**



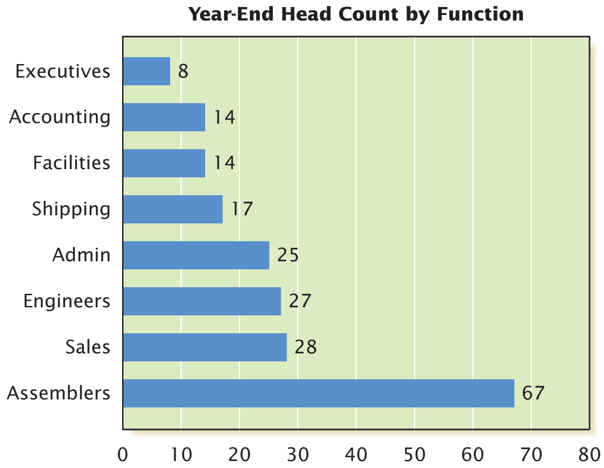




**Figure 11.8 Pie Charts Versus Bar Charts**
Pie charts are used frequently, but they aren't necessarily the best choice for many data presentations. This pie chart does make it easy to see that assemblers are the largest employee category, but other comparisons of slice sizes (such as Sales, Engineers, and Admin) are not as easy to make and require a numerical rather than a visual comparison. In contrast, the bar chart gives a quick visual comparison of every data point.

As computer technologies continue to generate large amounts of data that can be combined and connected in endless ways, a diverse class of display capabilities known as **data visualization** work to overcome all these drawbacks. In some instances, data visualization is less about clarifying individual data points and more about extracting broad meaning from giant masses of data or putting the data in context.[18]

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**Data visualization and infographics gateway**
This unique web resource offers links to a vast array of data visualization and infographic techniques and examples. Go to **http://real-timeupdates.com/bce7.** Under "Students," click on "Learn More."

Data visualization has become an important tool for companies working with *big data*, a term used to describe massive collections of data from a variety of sources piling up at high speeds.[19] Interactive apps let users "drill down" into data sets to find details or look at data collections from a variety of perspectives.

Data visualization is an important feature for companies using *big data*.

In addition to displaying large data sets and linkages within data sets, other kinds of visualization tools combine data with textual information to communicate complex or dynamic data much faster than conventional presentations can. For example, a *tag cloud* shows the relative frequency of terms, or tags (content labels), in an article, a blog, a website, survey data, or another collection of text.[20]

## Flowcharts and Organization Charts

A **flowchart** (see Figure 11.9 on the next page) illustrates a sequence of events from start to finish; it is indispensable when illustrating processes, procedures, and sequential relationships. For general business purposes, you don't need to be too concerned about the specific shapes on a flowchart; just be sure to use them consistently. However, you should be aware that there is a formal flowchart "language," in which each shape has a specific meaning (diamonds are decision points, rectangles are process steps, and so on). If you're communicating with computer programmers and others who are accustomed to formal flowcharting, make sure you use the correct symbols to avoid confusion.

Be aware that there is a formal symbolic "language" in flowcharting; each shape has a specific meaning.

As the name implies, an **organization chart** illustrates the positions, units, or functions in an organization and the ways they interrelate (see Figure 11.10 on the next page). Organization charts can be used to portray almost any hierarchy, in fact, including the topics, subtopics, and supporting points you need to organize for a report.

## Maps, Drawings, Diagrams, Infographics, and Photographs

Maps can show location, distance, points of interest (such as competitive retail outlets), and geographic distribution of data, such as sales by region or population by state. In addition to

Use maps to represent statistics by geographic area and to show spatial relationships.

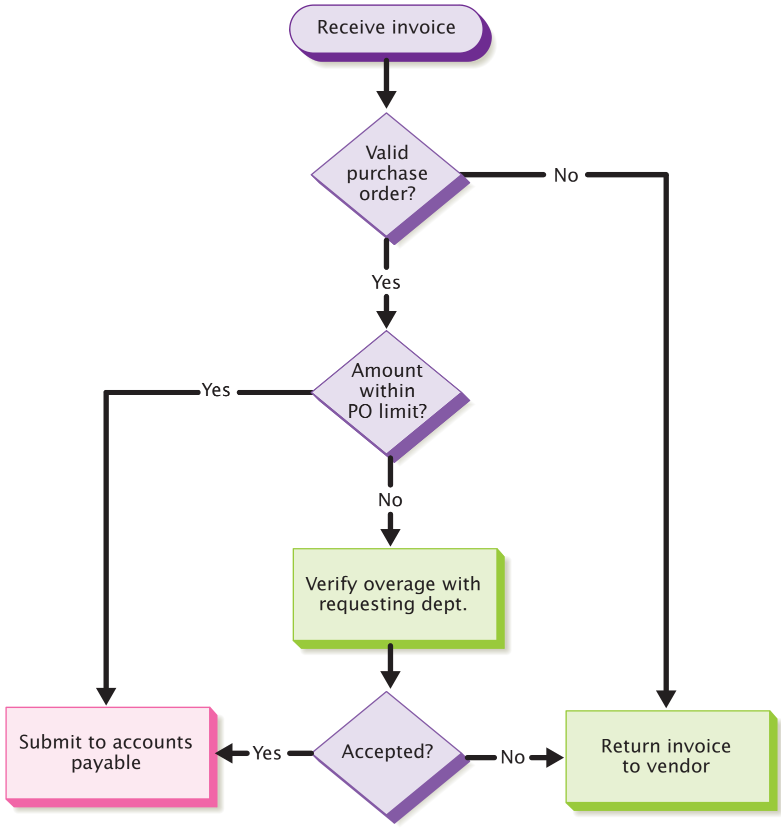


**Figure 11.9 Flowchart**
Flowcharts show sequences of events and are most valuable when the process or procedure has a number of decision points and variable paths.

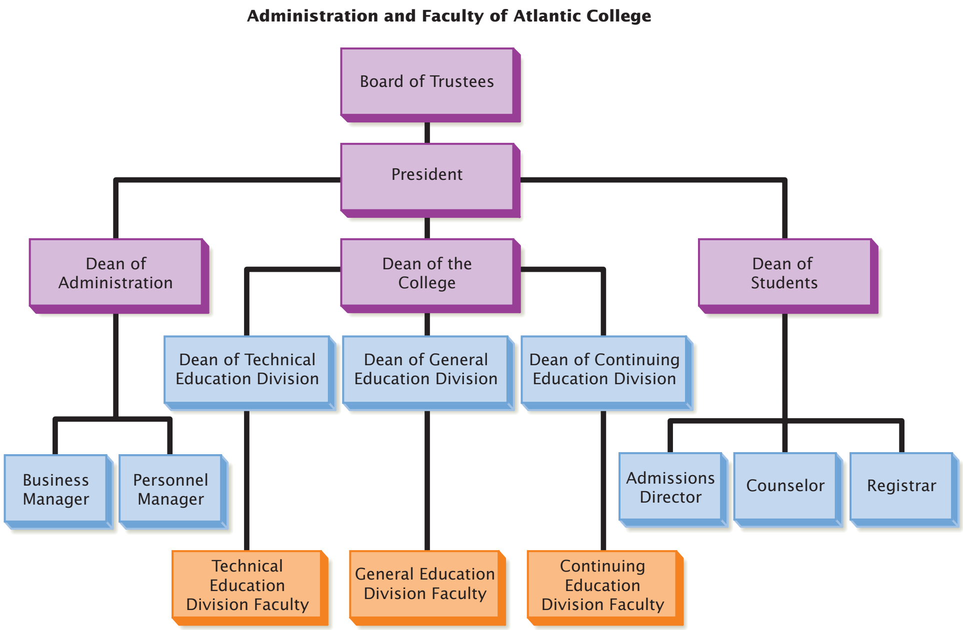


**Figure 11.10 Organization Chart**
An organization chart is the expected way to illustrate the hierarchy of positions in an organization.

presenting facts and figures, maps are useful for showing market territories, distribution routes, and facilities locations. When combined with databases and aerial or satellite photography in *geographic information systems (GIS)*, maps become extremely powerful visual reporting tools.

Drawings and diagrams can show an endless variety of business concepts, such as the network of suppliers in an industry, the flow of funds through a company, or the process for completing payroll each week. More-complex diagrams can convey technical topics such as the operation of a machine or repair procedures.

**Infographics** are a special class of diagrams that can convey data as well as concepts or ideas. In addition, they contain enough visual and textual information to function as independent, standalone documents. Broadly speaking, there are two types of infographics: those that are stylized collections of charts or graphs and those that have a structured narrative. The first type, represented by Figure 11.11a (see next page), don't necessarily convey any more information than basic charts and graphs in a conventional report would, but their communication value lies in their ability to catch the audience's attention and the ease with which they can be distributed online. The second type, represented by Figure 11.11b, take full advantage of the visual medium to tell stories or show interconnected processes. Such infographics can be powerful communication tools, even to the point of replacing conventional reports.

Photographs offer both functional and decorative value, and nothing can top a photograph when you need to show exact appearances. However, in some situations, a photograph can show too much detail, which is one reason repair manuals frequently use drawings instead of photos, for instance. Because audiences expect photographs to show literal visual truths, you must take care when using image-processing tools such as Adobe Photoshop.

Drawings are sometimes better than photographs because they let you focus on the most important details.

Use photographs for visual appeal and to show exact appearances.

**REAL-TIME UPDATES**
LEARN MORE BY VISITING THIS WEBSITE
**Ten tools for creating infographics**
These online tools (many are free) offer a variety of ways to create infographics. Go to **http://real-timeupdates.com/bce7.** Under "Students," click on "Learn More."

**REAL-TIME UPDATES**
LEARN MORE BY VISITING THIS WEBSITE
**Ideas for using Instagram for business communication**
The Instagram for Business blog discusses ways to use the popular photo-sharing service. Go to **http://real-timeupdates.com/bce7.** Under "Students," click on "Learn More."

### Animation and Video

Computer animation and video can offer unparalleled visual impact when they offer appropriate content in a well-produced package. At a simple level, you can animate shapes and text on presentation slides (see Chapter 14). At a more sophisticated level, software such as Adobe Flash enables the creation of multimedia files that include computer animation, digital video, and other elements.

The combination of simple digital video recording and video-sharing websites such as YouTube has spurred a revolution in business video applications in recent years. Product demonstrations, company overviews, promotional presentations, and training seminars are among the most popular applications of business video. *Branded channels* on YouTube allow companies to present their videos as an integrated collection in a customized user interface.

## DESIGNING EFFECTIVE VISUALS

Computers make it easy to create visuals, but they also make it easy to create ineffective visuals. However, by following the design principles discussed on page 158, you can create basic visuals that are attractive and effective. If possible, have a professional designer set up a template for the various types of visuals you and your colleagues need to create. By specifying color palettes, typeface selections, slide layouts, and other choices, design templates have three important benefits: They help ensure better designs, they promote consistency across the organization, and they save everyone time by eliminating repetitive decision making.

**REAL-TIME UPDATES**
LEARN MORE BY VISITING THIS WEBSITE
**Great advice for getting started in digital video**
This website offers a wealth of advice on producing quality videos. Go to **http://real-timeupdates.com/bce7.** Under "Students," click on "Learn More."

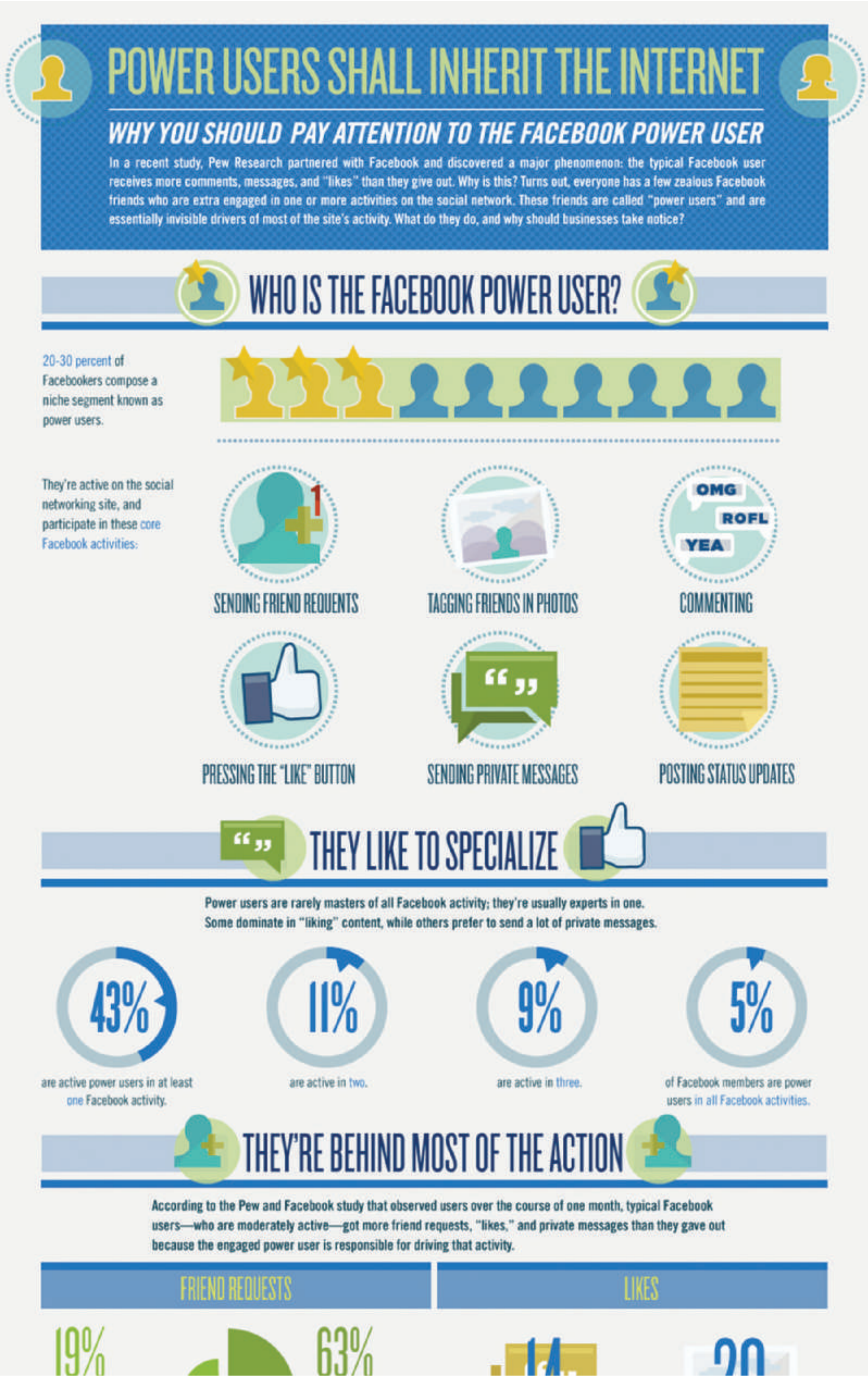


Figure 11.11a


Figure 11.11b

**Figure 11.11 Infographics**

Roughly speaking, infographics can be divided into simple presentations of data (Figure 11.11a) and visual narratives (Figure 11.11b) that use the full power of the medium to tell stories or illustrate processes.

*Source:* Copyright © 2012 by Demandforce, Inc. in partnership with Column Five Media. Used by permission; Copyright © 2013 by Sustainable America. Used by permission. sustainableamerica.org.

Remember that the style and quality of your visuals communicate a subtle message about your relationship with the audience. A simple sketch might be fine for a working meeting but inappropriate for a formal presentation or report. On the other hand, elaborate, full-color visuals may be viewed as extravagant for an informal report but may be entirely appropriate for a message to top management or influential outsiders.

In addition to being well designed, visuals need to be well integrated with text. First, try to position your visuals so that your audience won't have to flip back and forth (in printed documents) or scroll (on screen) between visuals and the text that discusses them. If space constraints prevent you from placing visuals close to relevant text, include pointers such as "Figure 2 (on the following page)" to help readers locate the image quickly. Second, clearly refer to visuals by number in the text of your report and help your readers understand the significance of visuals by referring to them before readers encounter them in the document or on screen. Third, write effective *titles*, *captions*, and *legends* to complete the integration of your text and visuals. A **title** provides a short description that identifies the content and purpose of the visual. A **caption** usually offers additional discussion of the visual's content and can be several sentences long, if appropriate. A **legend** helps readers "decode" the visual by explaining what various colors, symbols, or other design choices mean.

To tie visuals to the text, introduce them in the text and place them near the points they illustrate.

Be sure to check your visuals carefully for accuracy. Check for mistakes such as typographical errors, inconsistent color treatment, confusing or undocumented symbols, and misaligned elements. Make sure that your computer hasn't done something unexpected, such as arranging chart bars in an order you don't want or plotting line charts in confusing colors. Make sure your visuals are properly documented. Most important, make sure your visuals are honest—that they don't intentionally or unintentionally distort the truth.

Proof visuals as carefully as you proof text.

Finally, step back and consider the ethical implications of your visuals. Visuals are easy to misuse, intentionally or unintentionally. To avoid ethical lapses in your visuals, consider all possible interpretations, provide enough background information for readers to interpret your visuals correctly, and don't hide or minimize visual information that readers need in order to make informed judgments.[21]

For more information on visual communication, including design principles, ethical matters, and the latest tools for creating and displaying visuals, visit **http://real-timeupdates.com/bce7** and click on Chapter 11.

**MOBILE APPS**
Graph (Android) and Numbers (iOS) are two of the many apps available for creating charts and graphs on mobile devices.

# Completing Reports and Proposals

**4 LEARNING OBJECTIVE**
Summarize the four tasks involved in completing business reports and proposals.

As with shorter messages (Chapter 5), when you have finished your first draft, you need to perform four tasks in order to complete your document: revise, produce, proofread, and distribute. The revision process is essentially the same for reports as for other business messages, although it may take considerably longer, depending on the length and complexity of your documents. Evaluate your organization, style, and tone to make sure your content is clear, logical, and reader oriented. Then work to improve the report's readability by varying sentence length, keeping paragraphs short, using lists and bullets, and adding headings and subheadings. Remember that even minor mistakes can affect your credibility.

The revision process for long reports can take considerable time, so be sure to plan ahead.

Tight, efficient writing that is easy to skim is always a plus, but it's especially important for impatient online audiences.[22] Review online content carefully; strip out all information that doesn't meet audience needs and condense everything else as much as possible. Audiences will gladly return to sites that deliver quality information quickly—and they'll avoid sites that don't.

Tight, efficient writing is especially important with online content.

After assembling your report or proposal in its final form, review it thoroughly one last time, looking for inconsistencies, errors, and missing components. Don't forget to proof your visuals thoroughly and make sure they are positioned correctly. For online reports, make sure all links work as expected and all necessary files are active and available. If you need specific tips on proofreading documents, look back at Chapter 5.

TABLE 11.2 **Production Elements to Consider for Formal Reports and Proposals**

| Reports | Proposals |
|---|---|
| **Prefatory elements** (before the introduction)<br>• **Cover.** Include a concise title that gives readers the information they need to grasp the purpose and scope of the report. For a formal printed report, choose heavy, high-quality *cover stock*.<br>• **Title fly.** Some formal reports open with a plain sheet of paper that has only the title of the report on it, although this is certainly not necessary.<br>• **Title page.** Typically includes the report title, name(s) and title(s) of the writer(s), and date of submission; this information can be put on the cover instead.<br>• **Letter of authorization.** If you received written authorization to prepare the report, you may want to include that letter or memo in your report.<br>• **Letter of transmittal.** "Cover letter" that introduces the report and can include scope, methods, limitations, highlights of the report; offers to provide follow-on information or assistance; and acknowledges help received while preparing the report.<br>• **Table of contents.** List all section headings and major subheadings to show the location and hierarchy of the information in the report.<br>• **List of illustrations.** Consider including if the illustrations are particularly important, and you want to call attention to them.<br>• **Synopsis or executive summary.** See the discussion below. | **Prefatory elements** (before the introduction)<br>• **Cover, title fly, title page.** Same uses as with reports; be sure to follow any instructions in the RFP, if relevant.<br>• **Copy of or reference to the RFP.** Instead of having a letter of authorization, a solicited proposal should follow the instructions in the RFP. Some will instruct you to include the entire RFP in your proposal; others may want you to simply identify it by a name and tracking number.<br>• **Synopsis or executive summary.** These components are less common in formal proposals than in reports. In an unsolicited proposal, your letter of transmittal will catch the reader's interest. In a solicited proposal, the introduction will provide an adequate preview of the contents.<br>• **Letter of transmittal.** If the proposal is solicited, treat the transmittal letter as a positive message, highlighting those aspects of your proposal that may give you a competitive advantage. If the proposal is unsolicited, the transmittal letter should follow the advice for persuasive messages (see Chapter 9)—the letter must persuade the reader that you have something worthwhile to offer that justifies reading the proposal. |
| **Supplementary elements** (after the close)<br>• **Appendixes.** Additional information related to the report but not included in the main text because it is too lengthy or lacks direct relevance. List appendixes in your table of contents and refer to them as appropriate in the text.<br>• **Bibliography.** List the secondary sources you consulted; see Appendix B.<br>• **Index.** List names, places, and subjects mentioned in the report, along with the pages on which they occur. | **Supplementary elements** (after the close)<br>• **Appendixes.** Same uses as with reports; be sure to follow any instructions in the RFP, if relevant.<br>• **Résumés of key players.** For external proposals, résumés can convince readers that you have the talent to achieve the proposal's objectives. |

## PRODUCING FORMAL REPORTS AND PROPOSALS

The number and variety of parts you include in a report depend on the type of report, audience requirements, organizational expectations, and report length.

A synopsis is a brief overview of a report's key points; an executive summary is a fully developed "mini" version of the report.

Formal reports and proposals can include a variety of features beyond the text and visuals (see Table 11.2). Most of these provide additional information; a few are more decorative and add a degree of formality.

One of the most important elements to consider is an introductory feature that helps time-pressed readers either get a sense of what's in the document or even get all the key points without reading the document. A **synopsis**, sometimes called an **abstract**, is a brief overview (one page or less) of a report's most important points. The phrasing of a synopsis can be *informative* (presenting the main points in the order in which they appear in the text) if you're using the direct approach or *descriptive* (simply describing what the report is about, without "giving away the ending") if you're using the indirect approach. As an alternative to a synopsis or an abstract, a longer report may include an **executive summary**, a fully developed "mini" version of the report, for readers who lack the time or motivation to read the entire document.

For an illustration of how the various parts fit together in a report, see Figure 11.12, beginning on the next page.

**Reducing Electrovision's Travel and Entertainment Costs**

Large, bold type distinguishes the title from the other elements on the cover.

Prepared for
Dennis McWilliams,
Vice President of Operations
Electrovision, Inc.

The name of the recipient, if applicable, typically comes after the title.

Generous use of white space between elements gives the cover an open feel.

Prepared by
Linda Moreno, Manager
Cost Accounting Services
Electrovision, Inc.

February 16, 2015

Dating the report gives it a feeling of currency when it is submitted and conversely, as time passes, signals to future readers that the material might be out of date at that point.

The "how-to" tone of Moreno's title is appropriate for an action-oriented report that emphasizes recommendations. A more neutral title, such as "An Analysis of Electrovision's Travel and Entertainment Costs," would be more suitable for an informational report.

**(*continued*)**

**Figure 11.12 Analyzing an Effective Formal Report**

The memo format is appropriate for this internal report; the letter format would be used for transmitting an external report.

**MEMORANDUM**

**TO:** Dennis McWilliams, Vice President of Operations
**FROM:** Linda Moreno, Manager of Cost Accounting Services LM
**DATE:** February 16, 2015
**SUBJECT:** Reducing Electrovision's Travel and Entertainment Costs

Here is the report you requested January 28 on Electrovision's travel and entertainment costs.

Your suspicions were right. We are spending far too much on business travel. Our unwritten policy has been "anything goes," leaving us with no real control over T&E expenses. Although this hands-off approach may have been understandable when Electrovision's profits were high, we can no longer afford the luxury of going first class.

Moreno expects a positive response, so she presents her main conclusion right away.

The tone is conversational yet still businesslike and respectful.

The solutions to the problem seem rather clear. We need to have someone with centralized responsibility for travel and entertainment costs, a clear statement of policy, an effective control system, and a business-oriented travel service that can optimize our travel arrangements. We should also investigate alternatives to travel, such as videoconferencing. Perhaps more important, we need to change our attitude. Instead of viewing travel funds as a bottomless supply of money, all traveling employees need to act as if they were paying the bills themselves.

Getting people to economize is not going to be easy. In the course of researching this issue, I've found that our employees are deeply attached to their generous travel privileges. I think some would almost prefer a cut in pay to a loss in travel status. We'll need a lot of top management involvement to sell people on the need for moderation. One thing is clear: People will be very bitter if we create a two-class system in which top executives get special privileges while the rest of the employees make the sacrifices.

Acknowledging help given by others is good etiquette and a way to foster positive working relationships.

I'm grateful to Mary Lehman and Connie McIllvain for their considerable help in rounding up and sorting through five years' worth of expense reports.

Thanks for giving me the opportunity to work on this assignment. It's been a real education. If you have any questions about the report, please give me a call.

She closes graciously, with thanks and an offer to discuss the results.

In this report, Moreno decided to write a brief memo of transmittal and include a separate executive summary. Short reports (fewer than 10 pages) often combine the synopsis or executive summary with the memo or letter of transmittal.

**Figure 11.12 Analyzing an Effective Formal Report (*continued*)**

The table of contents doesn't include any elements that appear before the "Contents" page.

The headings are worded exactly as they appear in the text.

Moreno lists the figures because they are all significant, and the list is fairly short.

This and other prefatory pages are numbered with Roman numerals.

## CONTENTS



## LIST OF ILLUSTRATIONS



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The table lists only the page number on which a section begins, not the entire range of numbers.

Moreno included only first- and second-level headings in her table of contents, even though the report contains third-level headings. She prefers a shorter table of contents that focuses attention on the main divisions of thought. She used informative titles, which are appropriate for a report to a receptive audience.

**Figure 11.12 Analyzing an Effective Formal Report (*continued*)**

The executive summary begins by stating the purpose of the report.

Moreno presents the points in the executive summary in the same order as they appear in the report, using subheadings that summarize the content of the main sections of the report.

## EXECUTIVE SUMMARY

This report analyzes Electrovision's travel and entertainment (T&E) costs and presents recommendations for reducing those costs.

### Travel and Entertainment Costs Are Too High

Travel and entertainment is a large and growing expense category for Electrovision. The company spends over $16 million per year on business travel, and these costs have been increasing by 12 percent annually. Company employees make roughly 3,390 trips each year at an average cost per trip of $4,720. Airfares are the biggest expense, followed by hotels, meals, and rental cars.

The nature of Electrovision's business does require extensive travel, but the company's costs are excessive: Our employees spend more than twice the national average on travel and entertainment. Although the location of the company's facilities may partly explain this discrepancy, the main reason for our high costs is a management style that gives employees little incentive to economize.

### Cuts Are Essential

Electrovision management now recognizes the need to gain more control over this element of costs. The company is currently entering a period of declining profits, prompting management to look for every opportunity to reduce spending. At the same time, rising airfares and hotel rates are making T&E expenses more significant.

Her audience is receptive, so the tone in the executive summary is forceful; a more neutral approach would be better for hostile or skeptical readers.

### Electrovision Can Save $6 Million per Year

Fortunately, Electrovision has a number of excellent opportunities for reducing T&E costs. Savings of up to $6 million per year should be achievable, judging by the experience of other companies. A sensible travel-management program can save companies as much as 35 percent a year (Gilligan 39–40), and we should be able to save even more, since we purchase many more business-class tickets than the average. Four steps will help us cut costs:

1. Hire a director of travel and entertainment to assume overall responsibility for T&E spending, policies, and technologies, including the hiring and management of a national travel agency.
2. Educate employees on the need for cost containment, both in avoiding unnecessary travel and reducing costs when travel is necessary.
3. Negotiate preferential rates with travel providers.
4. Implement technological alternatives to travel, such as virtual meetings.

As necessary as these changes are, they will likely hurt morale, at least in the short term. Management will need to make a determined effort to explain the rationale for reduced spending. By exercising moderation in their own travel arrangements, Electrovision executives can set a good example and help other employees accept the changes. On the plus side, using travel alternatives such as web conferencing will reduce the travel burden on many employees and help them balance their business and personal lives.

The executive summary uses the same font and paragraph treatment as the text of the report.

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The page numbering in the executive summary continues with Roman numerals.

Moreno decided to include an executive summary because her report is aimed at a mixed audience, some of whom are interested in the details of her report and others who just want the "big picture." The executive summary is aimed at the second group, giving them enough information to make a decision without burdening them with the task of reading the entire report.

Her writing style matches the serious nature of the content without sounding distant or stiff. Moreno chose the formal approach because several members of her audience are considerably higher up in the organization, and she did not want to sound too familiar. In addition, her company prefers the impersonal style for formal reports.

**Figure 11.12 Analyzing an Effective Formal Report (*continued*)**

A color bar highlights the report title and the first-level headings; a variety of other design treatments are possible as well.

## REDUCING ELECTROVISION'S TRAVEL AND ENTERTAINMENT COSTS

### INTRODUCTION

Electrovision has always encouraged a significant amount of business travel. To compensate employees for the stress and inconvenience of frequent trips, management has authorized generous travel and entertainment (T&E) allowances. This philosophy has been good for morale, but last year Electrovision spent $16 million on travel and entertainment—$7 million more than it spent on research and development.

The introduction opens by establishing the need for action.

This year's T&E costs will affect profits even more, due to increases in airline fares and hotel rates. Also, the company anticipates that profits will be relatively weak for a variety of other reasons. Therefore, Dennis McWilliams, Vice President of Operations, has asked the accounting department to explore ways to reduce the T&E budget.

The purpose of this report is to analyze T&E expenses, evaluate the effect of recent hotel and airfare increases, and suggest ways to tighten control over T&E costs. The report outlines several steps that could reduce Electrovision's expenses, but the precise financial impact of these measures is difficult to project. The estimates presented here provide a "best guess" view of what Electrovision can expect to save.

In preparing this report, the accounting department analyzed internal expense reports for the past five years to determine how much Electrovision spends on travel and entertainment. These figures were then compared with average statistics compiled by Dow Jones (publisher of the *Wall Street Journal*) and presented as the Dow Jones Travel Index. We also analyzed trends and suggestions published in a variety of business journal articles to see how other companies are coping with the high cost of business travel.

Moreno mentions her sources and methods to increase credibility and to give readers a complete picture of the study's background.

### THE HIGH COST OF TRAVEL AND ENTERTAINMENT

Although many companies view travel and entertainment as an incidental cost of doing business, the dollars add up. At Electrovision the bill for airfares, hotels, rental cars, meals, and entertainment totaled $16 million last year. Our T&E budget has increased by 12 percent per year for the past five years. Compared to the average U.S. business traveler, Electrovision's expenditures are high, largely because of management's generous policy on travel benefits.

A *running footer* that contains the report title and the page number appears on every page.

*Reducing Electrovision's Travel and Entertainment Costs* Page 1

In her brief introduction, Moreno counts on topic sentences and transitions to indicate that she is discussing the purpose, scope, and limitations of the study.

**Figure 11.12** **Analyzing an Effective Formal Report (*continued*)**

The visual is placed as close as possible to the point it illustrates.

Each visual has a title that clearly indicates what it's about; titles are consistently placed to the left of each visual.

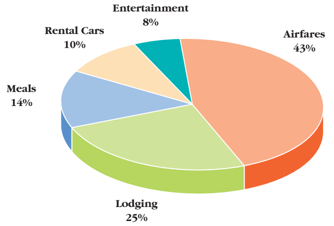
**$16 Million per Year Spent on Travel and Entertainment**

Electrovision's annual budget for travel and entertainment is only 8 percent of sales. Because this is a relatively small expense category compared with such things as salaries and commissions, it is tempting to dismiss T&E costs as insignificant. However, T&E is Electrovision's third-largest controllable expense, directly behind salaries and information systems.

Last year Electrovision personnel made about 3,390 trips at an average cost per trip of $4,720. The typical trip involved a round-trip flight of 3,000 miles, meals, and hotel accommodations for two or three days, and a rental car. Roughly 80 percent of trips were made by 20 percent of the staff—top management and sales personnel traveled most, averaging 18 trips per year.

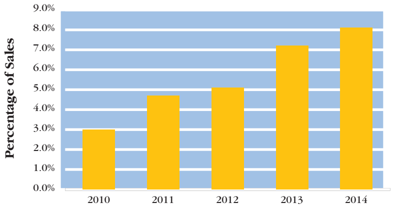
Figure 1 illustrates how the T&E budget is spent. The largest categories are airfares and lodging, which together account for $7 out of $10 that employees spend on travel and entertainment. This spending breakdown has been relatively steady for the past five years and is consistent with the distribution of expenses experienced by other companies.

**Figure 1**
Airfares and Lodging Account for Over Two-Thirds of Electrovision's T&E Budget




Although the composition of the T&E budget has been consistent, its size has not. As mentioned earlier, these expenditures have increased by about 12 percent per year for the past five years, roughly twice the rate of the company's sales growth (see Figure 2). This rate of growth makes T&E Electrovision's fastest-growing expense item.

**Figure 2**
T&E Expenses Continue to Increase as a Percentage of Sales




*Reducing Electrovision's Travel and Entertainment Costs* Page 2

Moreno opens the first main section of the body with a topic sentence that introduces an important fact about the subject of the section. Then she orients the reader to the three major points developed in the section.

**Figure 11.12 Analyzing an Effective Formal Report (*continued*)**

## Electrovision's Travel Expenses Exceed National Averages

Much of our travel budget is justified. Two major factors contribute to Electrovision's high T&E budget:

- With our headquarters on the West Coast and our major customer on the East Coast, we naturally spend a lot of money on cross-country flights.
- A great deal of travel takes place between our headquarters here on the West Coast and the manufacturing operations in Detroit, Boston, and Dallas. Corporate managers and division personnel make frequent trips to coordinate these disparate operations.

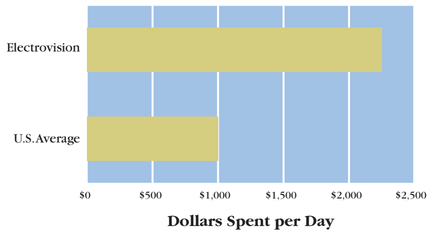
However, even though a good portion of Electrovision's travel budget is justifiable, the company spends considerably more on T&E than the average business traveler (see Figure 3).

Moreno introduces visuals before they appear and indicates what readers should notice about the data.

The visuals are numbered consecutively and referred to by their numbers in the text.

**Figure 3**
Electrovision Employees Spend Over Twice as Much as the Average Business Traveler

Source: *Wall Street Journal* and company records




The Dow Jones Travel Index calculates the average cost per day of business travel in the United States, based on average airfare, hotel rates, and rental car rates. The average fluctuates weekly as travel companies change their rates, but it has been running at about $1,000 per day for the last year or so. In contrast, Electrovision's average daily expense over the past year has been $2,250—a hefty 125 percent higher than average. This figure is based on the average trip cost of $4,720 listed earlier and an average trip length of 2.1 days.

## Spending Has Been Encouraged

Although a variety of factors may contribute to this differential, Electrovision's relatively high T&E costs are at least partially attributable to the company's philosophy and management style. Since many employees do not enjoy business travel, management has tried to make the trips more pleasant by authorizing business-class airfare, luxury hotel accommodations, and full-size rental cars. The sales staff is encouraged to entertain clients at top restaurants and to invite them to cultural and sporting events.

*Reducing Electrovision's Travel and Entertainment Costs* Page **3**

The chart in Figure 3 is simple but effective; Moreno includes just enough data to make her point. Notice how she is as careful about the appearance of her report as she is about the quality of its content.

**Figure 11.12 Analyzing an Effective Formal Report (*continued*)**

A bulleted list makes it easy for readers to identify and distinguish related points.

The cost of these privileges is easy to overlook, given the weakness of Electrovision's system for keeping track of T&E expenses:

- The monthly financial records do not contain a separate category for travel and entertainment; the information is buried under Cost of Goods Sold and under Selling, General, and Administrative Expenses.
- Each department head is given authority to approve any expense report, regardless of how large it may be.
- Receipts are not required for expenditures of less than $100.
- Individuals are allowed to make their own travel arrangements.
- No one is charged with the responsibility for controlling the company's total spending on travel and entertainment.

## GROWING IMPACT ON THE BOTTOM LINE

Informative headings focus reader attention on the main points. Such headings are appropriate when a report uses the direct order and is intended for a receptive audience. However, descriptive headings are more effective when a report uses the indirect order and readers are less receptive.

During the past three years, the company's healthy profits have resulted in relatively little pressure to push for tighter controls over all aspects of the business. However, as we all know, the situation is changing. We're projecting flat to declining profits for the next two years, a situation that has prompted all of us to search for ways to cut costs. At the same time, rising airfares and hotel rates have increased the impact of T&E expenses on the company's financial results.

### Lower Profits Underscore the Need for Change

The next two years promise to be difficult for Electrovision. After several years of steady increases in spending, the Postal Service is tightening procurement policies for automated mail-handling equipment. Funding for the A-12 optical character reader has been canceled. As a consequence, the marketing department expects sales to drop by 15 percent. Although Electrovision is negotiating several other promising R&D contracts, the marketing department does not foresee any major procurements for the next two to three years.

At the same time, Electrovision is facing cost increases on several fronts. As we have known for several months, the new production facility now under construction in Salt Lake City, Utah, is behind schedule and over budget. Labor contracts in Boston and Dallas will expire within the next six months, and plant managers there anticipate that significant salary and benefits concessions may be necessary to avoid strikes.

Moreover, marketing and advertising costs are expected to increase as we attempt to strengthen these activities to better cope with competitive pressures. Given the expected decline in revenues and increase in costs, the Executive Committee's prediction that profits will fall by 12 percent in the coming fiscal year does not seem overly pessimistic.

*Reducing Electrovision's Travel and Entertainment Costs* Page 4

Moreno designed her report to include plenty of white space so even those pages that lack visuals are still attractive and easy to read.

**Figure 11.12 Analyzing an Effective Formal Report (*continued*)**

### Airfares and Hotel Rates Are Rising

Business travelers have grown accustomed to frequent fare wars and discounting in the travel industry in recent years. Excess capacity and aggressive price competition, particularly in the airline business, made travel a relative bargain.

Moreno supports her argument with objective facts and sound reasoning.

However, that situation has changed as weaker competitors have been forced out and the remaining players have grown stronger and smarter. Airlines and hotels are better at managing inventory and keeping occupancy rates high, which translates into higher costs for Electrovision. Last year saw some of the steepest rate hikes in years. Business airfares (tickets most likely to be purchased by business travelers) jumped more than 40 percent in many markets. The trend is expected to continue, with rates increasing another 5 to 10 percent overall (Phillips 331; "Travel Costs Under Pressure" 30; Dahl B6).

Given the fact that air and hotel costs account for almost 70 percent of our T&E budget, the trend toward higher prices in these two categories will have serious consequences, unless management takes action to control these costs.

## METHODS FOR REDUCING T&E COSTS

The recommendations are realistic, noting both the benefits and the risks of taking action.

By implementing a number of reforms, management can expect to reduce Electrovision's T&E budget by as much as 40 percent. This estimate is based on the general assessment made by American Express (Gilligan 39) and on the fact that we have an opportunity to significantly reduce air travel costs by eliminating business-class travel. However, these measures are likely to be unpopular with employees. To gain acceptance for such changes, management will need to sell employees on the need for moderation in T&E allowances.

### Four Ways to Trim Expenses

By researching what other companies are doing to curb T&E expenses, the accounting department has identified four prominent opportunities that should enable Electrovision to save about $6 million annually in travel-related costs.

#### *Institute Tighter Spending Controls*

A single individual should be appointed director of travel and entertainment to spearhead the effort to gain control of the T&E budget. More than a third of all U.S. companies now employ travel managers ("Businesses Use Savvy Managers" 4). The director should be familiar with the travel industry and should be well versed in both accounting and information technology. The director should also report to the vice president of operations. The director's first priorities should be to establish a written T&E policy and a cost-control system.

Electrovision currently has no written policy on travel and entertainment, a step that is widely recommended by air travel experts (Smith D4). Creating a policy would clarify management's position and serve as a vehicle for communicating the need for moderation.

*Reducing Electrovision's Travel and Entertainment Costs* Page **5**

Moreno creates a forceful tone by using action verbs in the third-level subheadings of this section. This approach is appropriate to the nature of the study and the attitude of the audience. However, in a status-conscious organization, the imperative verbs might sound a bit too presumptuous coming from a junior member of the staff.

**Figure 11.12 Analyzing an Effective Formal Report (*continued*)**

In addition to making key points easy to find, bulleted lists help break up the text to relieve the reader's eye.

At a minimum, the policy should include the following:

- All travel and entertainment should be strictly related to business and should be approved in advance.
- Except under special circumstances to be approved on a case-by-case basis, employees should travel by coach and stay in mid-range business hotels.
- The T&E policy should apply equally to employees at all levels.

To implement the new policy, Electrovision will need to create a system for controlling T&E expenses. Each department should prepare an annual T&E budget as part of its operating plan. These budgets should be presented in detail so that management can evaluate how T&E dollars will be spent and can recommend appropriate cuts. To help management monitor performance relative to these budgets, the director of travel should prepare monthly financial statements showing actual T&E expenditures by department.

The director of travel should also be responsible for retaining a business-oriented travel service that will schedule all employee business trips and look for the best travel deals, particularly in airfares. In addition to centralizing Electrovision's reservation and ticketing activities, the agency will negotiate reduced group rates with hotels and rental car firms. The agency selected should have offices nationwide so that all Electrovision facilities can channel their reservations through the same company. This is particularly important in light of the dizzying array of often wildly different airfares available between some cities. It's not uncommon to find dozens of fares along commonly traveled routes (Rowe 30). In addition, the director can help coordinate travel across the company to secure group discounts whenever possible (Barker 31; Miller B6).

Moreno lists the steps needed to implement her recommendations.

### *Reduce Unnecessary Travel and Entertainment*

One of the easiest ways to reduce expenses is to reduce the amount of traveling and entertaining that occurs. An analysis of last year's expenditures suggests that as much as 30 percent of Electrovision's travel and entertainment is discretionary. The professional staff spent $2.8 million attending seminars and conferences last year. Although these gatherings are undoubtedly beneficial, the company could save money by sending fewer representatives to each function and perhaps by eliminating some of the less valuable seminars.

Similarly, Electrovision could economize on trips between headquarters and divisions by reducing the frequency of such visits and by sending fewer people on each trip. Although there is often no substitute for face-to-face meetings, management could try to resolve more internal issues through telephone, electronic, and written communication.

Electrovision can also reduce spending by urging employees to economize. Instead of flying business class, employees can fly coach class or take advantage of discount fares. Rather than ordering a $50 bottle of wine, employees can select a less expensive bottle or dispense with

*Reducing Electrovision's Travel and Entertainment Costs* Page 6

Moreno takes care not to overstep the boundaries of her analysis. For instance, she doesn't analyze the value of the seminars that employees attend every year, so she avoids any absolute statements about reducing travel to seminars.

**Figure 11.12 Analyzing an Effective Formal Report (*continued*)**

alcohol entirely. People can book rooms at moderately priced hotels and drive smaller rental cars.

### *Obtain Lowest Rates from Travel Providers*

Apart from urging employees to economize, Electrovision can also save money by searching for the lowest available airfares, hotel rates, and rental car fees. Currently, few employees have the time or knowledge to seek out travel bargains. When they need to travel, they make the most convenient and comfortable arrangements. A professional travel service will be able to obtain lower rates from travel providers.

Judging by the experience of other companies, Electrovision may be able to trim as much as 30 to 40 percent from the travel budget simply by looking for bargains in airfares and negotiating group rates with hotels and rental car companies. Electrovision should be able to achieve these economies by analyzing its travel patterns, identifying frequently visited locations, and selecting a few hotels that are willing to reduce rates in exchange for guaranteed business. At the same time, the company should be able to save up to 40 percent on rental car charges by negotiating a corporate rate.

By pointing out possible difficulties and showing that she has considered all angles, Moreno builds reader confidence in her judgment.

The possibilities for economizing are promising; however, making the best travel arrangements often requires trade-offs such as the following:

- The best fares might not always be the lowest. Indirect flights are usually cheaper, but they take longer and may end up costing more in lost work time.
- The cheapest tickets often require booking 14 or even 30 days in advance, which is often impossible for us.
- Discount tickets are usually nonrefundable, which is a serious drawback when a trip needs to be canceled at the last minute.

### *Replace Travel with Technological Alternatives*

Online meeting systems such as WebEx and GoTo Meeting offer a compelling alternative to many instances of business travel. With webcam video, application/screen sharing, and collaboration tools such as virtual whiteboards, they have made great strides toward replicating the in-person meeting experience.

As effective as they can be, though, they shouldn't automatically replace every in-person meeting. When establishing a business relationship, for example, meeting face to face is an important part of building trust and getting past the uncertainties of working with a new partner. Part of the new travel director's job would be to draft guidelines for choosing travel or on-line meeting options.

*Reducing Electrovision's Travel and Entertainment Costs* Page **7**

Note how Moreno makes the transition from section to section. The first sentence under the second heading on this page refers to the subject of the previous paragraph and signals a shift in thought.

**Figure 11.12 Analyzing an Effective Formal Report (*continued*)**

An informative title in the table is consistent with the way headings are handled throughout this report, and it is appropriate for a report to a receptive audience.

### The Impact of Reforms

By implementing tighter controls, reducing unnecessary expenses, negotiating more favorable rates, and exploring alternatives to travel, Electrovision should be able to reduce its T&E budget significantly. As Table 1 illustrates, the combined savings should be in the neighborhood of $6 million, although the precise figures are somewhat difficult to project.

The in-text reference to the table highlights the key point the reader should get from the table.

**Table 1**
Electrovision Can Trim Travel and Entertainment Costs
by an Estimated $6 Million per Year

| SOURCE OF SAVINGS | ESTIMATED SAVINGS |
|---|---|
| Switching from business-class to coach airfare | $2,300,000 |
| Negotiating preferred hotel rates | 940,000 |
| Negotiating preferred rental car rates | 460,000 |
| Systematically searching for lower airfares | 375,000 |
| Reducing interdivisional travel | 675,000 |
| Reducing seminar and conference attendance | 1,250,000 |
| **TOTAL POTENTIAL SAVINGS** | **$6,000,000** |

Including financial estimates helps management envision the impact of the suggestions, even though the estimated savings are difficult to project accurately.

To achieve the economies outlined in the table, Electrovision will incur expenses for hiring a director of travel and for implementing a T&E cost-control system. These costs are projected at $115,000: $105,000 per year in salary and benefits for the new employee and a one-time expense of $10,000 for the cost-control system. The cost of retaining a full-service travel agency is negligible, even with the service fees that many are now passing along from airlines and other service providers.

The measures required to achieve these savings are likely to be unpopular with employees. Electrovision personnel are accustomed to generous T&E allowances, and they are likely to resent having these privileges curtailed. To alleviate their disappointment

- Management should make a determined effort to explain why the changes are necessary.
- The director of corporate communication should be asked to develop a multifaceted campaign that will communicate the importance of curtailing T&E costs.
- Management should set a positive example by adhering strictly to the new policies.
- The limitations should apply equally to employees at all levels in the organization.



Note how Moreno calls attention in the first paragraph to items in the following table, without repeating the information in the table.

**Figure 11.12 Analyzing an Effective Formal Report (*continued*)**

She uses a descriptive heading for the last section of the text. In informational reports, this section is often called "Summary"; in analytical reports, it is called "Conclusions" or "Conclusions and Recommendations."

Moreno summarizes her conclusions in the first two paragraphs—a good approach because she organized her report around conclusions and recommendations, so readers have already been introduced to them.

**CONCLUSIONS AND RECOMMENDATIONS**

Electrovision is currently spending $16 million per year on travel and entertainment. Although much of this spending is justified, the company's costs are high relative to competitors' costs, mainly because Electrovision has been generous with its travel benefits.

Electrovision's liberal approach to travel and entertainment was understandable during years of high profitability; however, the company is facing the prospect of declining profits for the next several years. Management is therefore motivated to cut costs in all areas of the business. Reducing T&E spending is particularly important because the bottom-line impact of these costs will increase as airline fares increase.

Electrovision should be able to reduce T&E costs by as much as 40 percent by taking four important steps:

Presenting the recommendations in a list gives each one emphasis.

1. *Institute tighter spending controls.* Management should hire a director of travel and entertainment who will assume overall responsibility for T&E activities. Within the next six months, this director should develop a written travel policy, institute a T&E budget and a cost-control system, and retain a professional, business-oriented travel agency that will optimize arrangements with travel providers.
2. *Reduce unnecessary travel and entertainment.* Electrovision should encourage employees to economize on T&E spending. Management can accomplish this by authorizing fewer trips and by urging employees to be more conservative in their spending.
3. *Obtain lowest rates from travel providers.* Electrovision should also focus on obtaining the best rates on airline tickets, hotel rooms, and rental cars. By channeling all arrangements through a professional travel agency, the company can optimize its choices and gain clout in negotiating preferred rates.
4. *Replace some travel with technological alternatives.* Online meeting systems should be adequate for most of our tactical meetings with established clients and for most internal communication as well.

Because these measures may be unpopular with employees, management should make a concerted effort to explain the importance of reducing travel costs. The director of corporate communication should be given responsibility for developing a plan to communicate the need for employee cooperation.

*Reducing Electrovision's Travel and Entertainment Costs* Page 9

Moreno doesn't introduce any new facts in this section. In a longer report she might have divided this section into subsections, labeled "Conclusions" and "Recommendations," to distinguish between the two.

**Figure 11.12 Analyzing an Effective Formal Report (*continued*)**

MLA style lists references alphabetically by the author's last name, and when the author is unknown, by the title of the reference. (See Appendix B for additional details on preparing reference lists.)

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Moreno's list of references follows the style recommended in the *MLA Style Manual*. The box below shows how these sources would be cited following American Psychological Association (APA) style.

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**Figure 11.12** **Analyzing an Effective Formal Report (*continued*)**

Just as with reports, the text of a proposal is composed of an introduction, a body, and a close. The introduction presents and summarizes the problem you intend to solve and your solution. It highlights the benefits the reader will receive from the solution. The body explains the complete details of the solution: how the job will be done, how it will be broken into tasks, what method will be used to do it (including the required equipment, material, and personnel), when the work will begin and end, how much the work will cost, and why your company is qualified (for external proposals). The close emphasizes the benefits readers will realize from your solution and ends with a persuasive *call to action* (see Figure 11.13).

O'Donnell & Associates, Inc.

1793 East Westerfield Road, Arlington Heights, Illinois 60005
(847) 398-1148 Fax: (847) 398-1149 Email: dod@ix.netcom.com

July 30, 2015

Ms. Joyce Colton, P.E.
AGI Builders, Inc.
1280 Spring Lake Drive
Belvidere, Illinois, 61008

Subject: Proposal No. F-0087 for AGI Builders, Elgin Manufacturing Campus

Dear Ms. Colton:

O'Donnell & Associates is pleased to submit the following proposal to provide construction testing services for the mass grading operations and utility work at the Elgin Manufacturing Campus, 126th St., Elgin, Illinois. Our company has been providing construction-testing services in the Chicago area since 1972 and has performed numerous large-scale geotechnical investigations across Illinois, including more than 100 at O'Hare International Airport, Midway Airport, Meig's Field, and other airports.

The opening paragraph serves as an introduction.

The introduction grabs the reader's attention by highlighting company qualifications.

**Background**

Headings divide the proposal into logical segments for easy reading.

The project background section acknowledges the two projects and their required timeline.

It is our understanding that the work consists of two projects: (1) the mass grading operations will require approximately six months, and (2) the utility work will require approximately three months. The two operations are scheduled as follows:

| | |
|---|---|
| Mass Grading Operation | September 2015–February 2016 |
| Utility Work | March 2016–May 2016 |

**Proposed Approach and Work Plan**

O'Donnell & Associates will perform observation and testing services during both the mass grading operations and the excavation and backfilling of the underground utilities. Specifically, we will perform field density tests on the compacted material as required by the job specifications using a nuclear moisture/density gauge. We will also conduct appropriate laboratory tests such as ASTM D-1557 Modified Proctors. We will prepare detailed reports summarizing the results of our field and laboratory testing. Fill materials to be placed at the site may consist of natural granular materials (sand), processed materials (crushed stone, crushed concrete, slag), or clay soils. O'Donnell & Associates will provide qualified personnel to perform the necessary testing.

The work plan describes the scope of the project and outlines specific tests the company will perform.

MyBCommLab Apply Figure 11.13's key concepts by going to **mybcommlab.com**

(*continued*)

**Figure 11.13 External Solicited Proposal**
This proposal was submitted by Dixon O'Donnell, vice president of O'Donnell & Associates, a geotechnical engineering firm that conducts a variety of environmental testing services. The company is bidding on the mass grading and utility work specified by AGI Builders. As you review this document, pay close attention to the specific items addressed in the proposal's introduction, body, and closing.

Ms. Joyce Colton, AGI Builders | Page 2 | July 30, 2015

The work plan also explains who will be responsible for the various tasks.

Kevin Patel will be the lead field technician responsible for the project. A copy of Mr. Patel's résumé is included with this proposal for your review. Kevin will coordinate field activities with your job site superintendent and make sure that appropriate personnel are assigned to the job site. Overall project management will be the responsibility of Joseph Proesel. Project engineering services will be performed under the direction of Dixon O'Donnell, P.E. All field personnel assigned to the site will be familiar with and abide by the Project Site Health and Safety Plan prepared by Carlson Environmental, Inc., dated April 2015.

The project leader's résumé is attached to the proposal, providing additional detail without cluttering up the body of the proposal.

**Qualifications**

O'Donnell & Associates has been providing quality professional services since 1972 in the areas of

The qualifications section grabs attention by mentioning compelling qualifications.

- Geotechnical engineering
- Materials testing and inspection
- Pavement evaluation
- Environmental services
- Engineering and technical support (CADD) services

The company provides Phase I and Phase II environmental site assessments, preparation of LUST site closure reports, installation of groundwater monitoring wells, and testing of soil/groundwater samples for environmental contaminants. Geotechnical services include all phases of soil mechanics and foundation engineering, including foundation and lateral load analysis, slope stability analysis, site preparation recommendations, see page analysis, pavement design, and settlement analysis.

O'Donnell & Associates materials testing laboratory is certified by AASHTO Accreditation Program for the testing of Soils, Aggregate, Hot Mix Asphalt and Portland Cement Concrete. A copy of our laboratory certification is included with this proposal. In addition to in-house training, field and laboratory technicians participate in a variety of certification programs, including those sponsored by the American Concrete Institute (ACI) and Illinois Department of Transportation (IDOT).

Describing *certifications* (approvals by recognized industry associations or government agencies) helps build the company's credibility.

**Costs**

On the basis of our understanding of the scope of the work, we estimate the total cost of the two projects to be $100,260.00, as follows:

**Figure 11.13** **External Solicited Proposal (*continued*)**

Ms. Joyce Colton, AGI Builders    Page 3    July 30, 2015

**Cost Estimates**

| **Cost Estimate: Mass Grading** | **Units** | **Rate ($)** | **Total Cost ($)** |
|---|---|---|---|
| *Field Inspection* | | | |
| Labor | 1,320 hours | $38.50 | $ 50,820.00 |
| Nuclear Moisture Density Meter | 132 days | 35.00 | 4,620.00 |
| Vehicle Expense | 132 days | 45.00 | 5,940.00 |
| *Laboratory Testing* | | | |
| Proctor Density Tests (ASTM D-1557) | 4 tests | 130.00 | 520.00 |
| *Engineering/Project Management* | | | |
| Principal Engineer | 16 hours | 110.00 | 1,760.00 |
| Project Manager | 20 hours | 80.00 | 1,600.00 |
| Administrative Assistant | 12 hours | 50.00 | 600.00 |
| *Subtotal* | | | **$ 65,860.00** |

A clear and complete itemization of estimated costs builds confidence in dependability of the project's financial projections.

| **Cost Estimate: Utility Work** | **Units** | **Rate ($)** | **Total Cost ($)** |
|---|---|---|---|
| *Field Inspection* | | | |
| Labor | 660 hours | $ 38.50 | $ 25,410.00 |
| Nuclear Moisture Density Meter | 66 days | 5.00 | 2,310.00 |
| Vehicle Expense | 66 days | 45.00 | 2,970.00 |
| *Laboratory Testing* | | | |
| Proctor Density Tests (ASTM D-1557) | 2 tests | 130.00 | 260.00 |
| *Engineering/Project Management* | | | |
| Principal Engineer | 10 hours | 110.00 | 1,100.00 |
| Project Manager | 20 hours | 80.00 | 1,600.00 |
| Administrative Assistant | 15 hours | 50.00 | 750.00 |
| *Subtotal* | | | **$ 34,400.00** |
| **Total Project Costs** | | | **$100,260.00** |

This estimate assumes full-time inspection services. However, our services may also be performed on an as-requested basis, and actual charges will reflect time associated with the project. We have attached our standard fee schedule for your review. Overtime rates are for hours in excess of 8.0 hours per day, before 7:00 a.m., after 5:00 p.m., and on holidays and weekends.

To give the client some budgetary flexibility, the proposal offers an alternative to the fixed-fee approach—which may lower any resistance to accepting the bid.

**Figure 11.13** **External Solicited Proposal (*continued*)**

Ms. Joyce Colton, AGI Builders | Page 4 | July 30, 2015

**Authorization**

The brief close emphasizes the bidder's qualifications and asks for a decision.

With a staff of over 30 personnel, including registered professional engineers, resident engineers, geologists, construction inspectors, laboratory technicians, and drillers, we are confident that O'Donnell & Associates is capable of providing the services required for a project of this magnitude.

If you would like our firm to provide the services as outlined in this proposal, please sign this letter and return it to us along with a certified check in the amount of $10,000 (our retainer) by August 14, 2015. Please call me if you have any questions regarding the terms of this proposal or our approach.

The call to action clarifies the steps needed to put the project in motion.

Sincerely,

Dixon O'Donnell

Dixon O'Donnell
Vice President

Enclosures

Accepted for AGI BUILDERS, INC.

By______________________________ Date ______________________________

The customer's signature will make the proposal a binding contract.

**Figure 11.13** External Solicited Proposal (*continued*)

## DISTRIBUTING REPORTS AND PROPOSALS

For physical distribution of important printed reports or proposals, consider spending the extra money for a professional courier or package delivery service. Doing so can help you stand out in a crowd, and it lets you verify receipt. Alternatively, if you've prepared the document for a single person or small group in your office or the local area, delivering it in person will give you the chance to personally "introduce" the report and remind readers why they're receiving it.

For digital distribution, unless your audience specifically requests a word processor file, provide documents as portable document format (PDF) files. Using Adobe Acrobat or similar products, you can quickly convert reports and proposals to PDF files that are easy to share online. PDFs are generally considered safer than word processor files, but they can also be used to transmit computer viruses.[23]

Many businesses use the Adobe portable document format (PDF) to distribute reports electronically.

If your company or client expects you to distribute your reports via cloud storage, a web-based content management system, a shared workspace, or some other online location, double-check that you've uploaded the correct file(s) to the correct location. Verify the on-screen display of your reports after you've posted them, making sure graphics, charts, links, and other elements are in place and operational.

**MOBILE APPS**

Dropbox lets you store files in the cloud and access or share them from PCs and mobile devices.

For more information on completing reports and proposals, visit **http://real-timeupdates.com/bce7** and click on Chapter 11.

# Chapter Review and Activities

## Learning Objectives: Check Your Progress

**Objective 1: List the topics commonly covered in the introduction, body, and close of informational reports, analytical reports, and proposals.**

The introduction of a report identifies who authorized the report and highlights its purpose and scope, the sources or methods used to gather information, important definitions, any limitations, and the order in which the various topics are covered. The body provides enough information to support its conclusion and recommendations, which can range from explanations of problems or opportunities to facts and trends to results of studies or investigations. The close summarizes key points, restates conclusions and recommendations if appropriate, and lists action items.

To a large extent, the content of proposals is dictated by the circumstances, particularly by whether the proposal is solicited or unsolicited. Proposals submitted in response to an RFP should always follow its instructions. The introduction commonly includes a background or statement of the problem, an overview of the proposed solution (or, for indirect proposals, a statement that a solution is about to be presented), the scope of the proposals, and a description of how the proposal is organized. The body usually includes a description of the proposed solution, a work plan that outlines how and when the work will be accomplished, a statement of qualifications of the individual or organization presenting the proposal, and a discussion of costs. The close summarizes the key points, emphasizes the benefits that readers will realize from the proposed solution, summarizes the merits of your approach, restates why you and your firm are a good choice, and asks for a decision from the reader.

**Objective 2: Identify six guidelines for drafting effective website content, and offer guidelines for becoming a valuable wiki contributor.**

Follow these six guidelines to draft effective online content: (1) Build trust by being accurate, current, complete, and authoritative; (2) adapt content to global audiences; (3) write web-friendly content that is compact and efficient; (4) present information in a concise, skimmable format; (5) make effective use of links; and (6) make the website a "living" document by adding fresh content and deleting content that is out of date or no longer relevant to the target audience.

To become a valuable wiki contributor, let go of traditional expectations of authorship, including individual recognition and control; don't be afraid to edit and improve existing content; use page templates and other formatting options to make sure your content is formatted in the same style as the rest of the wiki; keep edits and comments separate by using the "talk page" to discuss content, rather than inserting comments directly into the text; take advantage of the sandbox to learn how use the wiki's writing and editing tools; and understand and follow the wiki's contributor guidelines.

**Objective 3: Discuss six principles of graphic design that can improve the quality of your visuals, and identify the major types of business visuals.**

When preparing visuals, (1) use elements of design consistently; (2) use color and other elements to show contrast effectively; (3) strive for visual balance, either formal or informal, that creates a feel that is appropriate for your overall message; (4) use design choices to draw attention to key elements; (5) understand and follow design conventions; and (6) strive for simplicity in your visuals.

The major types of business visuals include tables; line charts and surface charts; bar charts and pie charts; data visualization; flowcharts and organization charts; maps, drawings, diagrams, infographics, and photographs; and animation and video.

**Objective 4: Summarize the four tasks involved in completing business reports and proposals.**

The four completion tasks of revising, producing, proofreading, and distributing all need to be accomplished with care, given the size and complexity of many reports. The production stage for a formal report or proposal can involve creating a number of elements not found in most other business documents. Possible prefatory parts (those coming before the main text of the report or proposal) include a cover, a title fly, a title page, a letter of authorization, a letter of transmittal, a table of contents, a list of illustrations, and a synopsis (a brief overview of the report) or an executive summary (a miniature version of the report). Possible supplemental parts (those coming after the main text of the report or proposal) include one or more appendixes, a bibliography, and an index.



## Test Your Knowledge

To review chapter content related to each question, refer to the indicated Learning Objective.

✪ **11-1.** Why must the introduction of an unsolicited proposal include a statement of the problem or opportunity that the proposal addresses? [LO-1]

**11-2.** What navigational elements can you use to help readers follow the structure and flow of information in a long report? [LO-1]

**11-3.** Why should you build trust with readers of online content, and how would you do so? [LO-2]

✪ **11-4.** What are the graphics options available to communicate business data? [LO-3]

**11-5.** How does a synopsis differ from an executive summary? [LO-4]

## Apply Your Knowledge

To review chapter content related to each question, refer to the indicated Learning Objective.

✪ **11-6.** Given that many businesspeople are hard-pressed for time, how would you ensure that your readers remain engaged by your reports? [LO-1]

**11-7.** If you wanted to compare average monthly absenteeism for five divisions in your company over the course of a year, which type of visual would you use? Explain your choice. [LO-3]

**11-8.** If a company receives a solicited formal proposal outlining the solution to a particular problem, is it ethical for the company to adopt the proposal's recommendations without hiring the firm that submitted the proposal? Why or why not? [LO-4]

**11-9.** Should you assume that all PDF documents sent online are safe? Why or why not? [LO-4]

## Practice Your Skills

### Activities

Each activity is labeled according to the primary skill or skills you will need to use. To review relevant chapter content, you can refer to the indicated Learning Objective. In some instances, supporting information will be found in another chapter, as indicated.

**11-10. Message Strategies: Informational Reports; collaboration: Team Projects [LO-1], Chapter 2** You and a classmate are helping Linda Moreno prepare her report on Electrovision's travel and entertainment costs (see Figure 11.12). This time, however, the report is to be informational rather than analytical, so it will not include recommendations. Review the existing report and determine what changes would be needed to make it an informational report. Be as specific as possible. For example, if your team decides the report needs a new title, what title would you use? Draft a transmittal memo for Moreno to use in conveying this informational report to Dennis McWilliams, Electrovision's vice president of operations.

**11-11. Media Skills: Wiki Collaboration [LO-2], Chapter 5** To access this wiki exercise, go to **http://real-timeupdates.com/bce7**, click on Student Assignments, and select Wiki Project 1. Follow the instructions for evaluating this short article and revising it to make it more reader oriented. Refer to the guidelines in Chapter 5 (page 154) for reminders about editing and revising the work of other writers.

**11-12. Media Skills: Wiki Collaboration [LO-2], Chapter 5** To access this wiki exercise, go to **http://real-timeupdates.com/bce7**, click on Student Assignments, and select Wiki Project 2. Follow the instructions for evaluating this wiki article and revising to make it more reader oriented. Refer to the guidelines in Chapter 5 (page 154) for reminders about editing and revising the work of other writers.

**11-13. Visual Communication: Creating Visuals [LO-3]** As an administration manager for Car Deck, an automotive spare parts facility, you have been assigned the task of preparing a business report for your organization that will be emailed to a business delegation prior to the team visiting your office. This report should visually reflect the geographical location of your office, the hierarchy within the organization, an interdepartmental headcount, the production facility with ongoing work, and comparative production data for the last two years. You are also required to preview your training seminars to the delegation and must decide on presentation method with the most visual impact. Which graphic aids would you adopt for each of the above? Create a report depicting these visuals along with suitable captions, making up your own data fields, in order to impress your delegation.

**11-14. Visual Communication: Creating Visuals [LO-3]** As directed by your instructor, team up with other students, making sure that at least one of you has a digital camera or camera phone capable of downloading images to your word-processing software. Find a busy location on campus or in the surrounding neighborhood, someplace with lots of signs, storefronts, pedestrians, and traffic. Scout out two different photo opportunities, one that maximizes the visual impression of crowding and clutter and one that minimizes this impression. For the first, assume that you are someone who advocates reducing the crowding and clutter, so you want to show how bad it is.

For the second, assume that you are a real estate agent or someone else who is motivated to show people that even though the location offers lots of shopping, entertainment, and other attractions, it's actually a rather calm and quiet neighborhood. Insert the two images in a word-processing document and write a caption for each that emphasizes the two opposite messages just described. Finally, write a brief paragraph, discussing the ethical implications of what you've just done. Have you distorted reality or just presented it in ways that work to your advantage? Have you prevented audiences from gaining the information they would need to make informed decisions?

11-15. **Message Strategies: Informational Reports** [LO-1] Review a long business article from a print or online source. Highlight examples of how the article uses headings, transitions, previews, and reviews to help the readers find their way.

11-16. **Message Strategies: Analytical Reports; Communication Ethics: Resolving Ethical Dilemmas [LO-1], Chapter 1** Imagine you are a reputable realtor marketing residential properties. There is a new residential project by renowned builders that has caught the attention of potential buyers due to its eco-friendly advertising campaign visuals. After taking the first customer on a site visit, you've discovered that the photographs of lush green landscapes presented in the advertisement do not match up to those of the actual property, and appear modified. You realize that this could be misleading and decide to write a report to the builders, profiling your customers' interest in the project and informing them about the modified visuals.

11-17. **Completing: Producing Formal Reports** [LO-4] You are president of the Friends of the Library, a not-for-profit group that raises funds and provides volunteers to support your local library. Every February, you send a report of the previous year's activities and accomplishments to the County Arts Council, which provides an annual grant of $1,000 toward your group's summer reading festival. Now it's February 6, and you've completed your formal report. Here are the highlights:

- Back-to-school book sale raised $2,000.
- Holiday craft fair raised $1,100.
- Promotion and prizes for summer reading festival cost $1,450.
- Materials for children's program featuring local author cost $125.
- New reference databases for library's career center cost $850.
- Bookmarks promoting library's website cost $200.

Write a letter of transmittal to Erica Maki, the council's director. Because she is expecting this report, you can use the direct approach. Be sure to express gratitude for the council's ongoing financial support.

## Expand Your Skills

### Critique the Professionals

Download the latest issue of the *International Trade Update* from the U.S. International Trade Administration's website. What techniques does the report use to help readers find their way through the document or direct readers to other sources of information? What techniques are used to highlight key points in the document? Are these techniques effective? Using whatever medium your instructor requests, write a brief summary of your analysis.

### Sharpen Your Career Skills Online

Bovée and Thill's Business Communication Web Search, at **http://websearch.businesscommunicationnetwork.com**, is a unique research tool designed specifically for business communication research. Use the Web Search function to find a website, video, PDF document, podcast, or presentation that offers advice on creating visuals for business reports. Write a brief email message to your instructor or a post for your class blog, describing the item that you found and summarizing the career skills information you learned from it.

# Cases

Website links for selected companies mentioned in cases can be found in the Student Assignments section at **http://real-timeupdates.com/bce7**.

### Short Reports

**11-18. Message Strategies: Informational Reports [LO-1], [LO-4]** You've been in your new job as human resources director for only a week, and already you have a major personnel crisis on your hands. Some employees in the marketing department got their hands on a confidential salary report and learned that, on average, marketing employees earn less than engineering employees. In addition, several top performers in the engineering group make significantly more than anybody in marketing. The report was instantly passed around the company by email, and now everyone is discussing the situation. You'll deal with the data security issue later; for now, you need to address the dissatisfaction in the marketing group.

CASE TABLE 11.1 **Selected Employment Data for Engineers and Marketing Staff**

| Employment Statistic | Engineering Department | Marketing Department |
|---|---|---|
| Average number of years of work experience | 18.2 | 16.3 |
| Average number of years of experience in current profession | 17.8 | 8.6 |
| Average number of years with company | 12.4 | 7.9 |
| Average number of years of college education | 6.9 | 4.8 |
| Average number of years between promotions | 6.7 | 4.3 |
| Salary range | $58–165k | $45–85k |
| Median salary | $77k | $62k |

Case Table 11.1 lists the salary and employment data you were able to pull from the employee database. You also had the opportunity to interview the engineering and marketing directors to get their opinions on the pay situation; their answers are listed in Case Table 11.2.

**Your task:** The CEO has asked for a short report, summarizing whatever data and information you have on engineering and marketing salaries. Feel free to offer your own interpretation of the situation as well (make up any information you need), but keep in mind that because you are a new manager with almost no experience in the company, your opinion might not have a lot of influence.

**11-19. Message Strategies: Analytical Reports [LO-1], [LO-2]** Your company develops a mobile phone app that helps people get detailed technical information about products while they are shopping. The original plan was to incorporate Quick Reference (QR) codes into the app so that people could scan QR stickers placed on product displays in retail stores. After decoding the QR code, the app would then pull up information about the product on display. However, you've recently learned about *near-field communication* (NFC), a short-range radio technology that might be able to accomplish the same thing in a way that is simpler for consumers to use.

**Your task:** Research the prospects for QR codes and NFC technology, and write a short comparative report. Draw a conclusion about which technology you think will dominate in the coming years.

## PORTFOLIO BUILDER/TEAM SKILLS

**11-20. Message Strategies: Analytical Reports [LO-1], [LO-5]** Anyone looking at the fragmented 21st-century landscape of media and entertainment options might be surprised to learn that poetry was once a dominant medium for not only creative literary expression but also philosophical, political, and even scientific discourse. Alas, such is no longer the case.

CASE TABLE 11.2 **Summary Statements from Department Director Interviews**

| Question | Engineering Director | Marketing Director |
|---|---|---|
| 1. Should engineering and marketing professionals receive roughly similar pay? | In general, yes, but we need to make allowances for the special nature of the engineering profession. In some cases, it's entirely appropriate for an engineer to earn more than a marketing person. | Yes. |
| 2. Why or why not? | Several reasons: (1) Top engineers are extremely hard to find, and we need to offer competitive salaries; (2) the structure of the engineering department doesn't provide as many promotional opportunities, so we can't use promotions as a motivator the way marketing can; (3) many of our engineers have advanced degrees, and nearly all pursue continuous education to stay on top of the technology. | Without marketing, the products the engineers create wouldn't reach customers, and the company wouldn't have any revenue. The two teams make equal contributions to the company's success. |
| 3. If we decide to balance pay between the two departments, how should we do it? | If we do anything to cap or reduce engineering salaries, we'll lose key people to the competition. | If we can't increase payroll immediately to raise marketing salaries, the only fair thing to do is freeze raises in engineering and gradually raise marketing salaries over the next few years. |

**Your task:** With a team of fellow students, your challenge is to identify opportunities to increase sales of poetry—any kind of poetry, in any medium. The following suggestions may help you get started:

- Research recent bestsellers in the poetry field and try to identify why they have been popular.
- Interview literature professors, professional poets, librarians, publishers, and bookstore personnel.
- Consider art forms and venues in which verse plays an essential role, including popular music and poetry slams.
- Conduct surveys and interviews to find out why consumers don't buy more poetry.
- Review professional journals that cover the field of poetry, including *Publishers Weekly* and *Poets & Writers*, from both business and creative standpoints.

Summarize your findings in a brief formal report; assume that your target readers are executives in the publishing industry.

## PORTFOLIO BUILDER

**11-21. Message Strategies: Analytical Reports [LO-1], [LO-4]** After several false starts, tablet computers have finally caught on among business users. In addition to Apple's popular iPad, seemingly every computer company on the planet is looking to get a share of this market. Will they be a passing fad? A cool toy or a serious business tool?

**Your task:** Prepare a short analytical report that compares the advantages and disadvantages of tablet computers for traveling salespeople.

### Long Reports

**11-22. Message Strategies: Informational Reports [LO-1], [LO-4]** Your company is the largest private employer in your metropolitan area, and the 43,500 employees in your workforce have a tremendous impact on local traffic. A group of city and county transportation officials recently approached your CEO with a request to explore ways to reduce this impact. The CEO has assigned you the task of analyzing the workforce's transportation habits and attitudes as a first step toward identifying potential solutions. He's willing to consider anything from subsidized bus passes to company-owned shuttle buses to telecommuting, but the decision requires a thorough understanding of employee transportation needs. Case Tables 11.3 through 11.7 summarize data you collected in an employee survey.

**Your task:** Present the results of your survey in an informational report, using the data provided in the tables.

**CASE TABLE 11.3 Employee Carpool Habits**

| Frequency of Use: Carpooling | Portion of Workforce |
|---|---|
| Every day, every week | 10,138 (23%) |
| Certain days, every week | 4,361 (10%) |
| Randomly | 983 (2%) |
| Never | 28,018 (64%) |

**CASE TABLE 11.4 Use of Public Transportation**

| Frequency of Use: Public Transportation | Portion of Workforce |
|---|---|
| Every day, every week | 23,556 (54%) |
| Certain days, every week | 2,029 (5%) |
| Randomly | 5,862 (13%) |
| Never | 12,053 (28%) |

**CASE TABLE 11.5 Effect of Potential Improvements to Public Transportation**

| Which of the Following Would Encourage You to Use Public Transportation More Frequently (check all that apply) | Portion of Respondents |
|---|---|
| Increased perception of safety | 4,932 (28%) |
| Improved cleanliness | 852 (5%) |
| Reduced commute times | 7,285 (41%) |
| Greater convenience: fewer transfers | 3,278 (18%) |
| Greater convenience: more stops | 1,155 (6%) |
| Lower (or subsidized) fares | 5,634 (31%) |
| Nothing could encourage me to take public transportation | 8,294 (46%) |

*Note:* This question was asked of respondents who use public transportation randomly or never, a subgroup that represents 17,915 employees, or 41 percent of the workforce.

**CASE TABLE 11.6 Distance Traveled to/from Work**

| Distance You Travel to Work (one way) | Portion of Workforce |
|---|---|
| Less than 1 mile | 531 (1%) |
| 1–3 miles | 6,874 (16%) |
| 4–10 miles | 22,951 (53%) |
| 11–20 miles | 10,605 (24%) |
| More than 20 miles | 2,539 (6%) |

**CASE TABLE 11.7 Is Telecommuting an Option?**

| Does the Nature of Your Work Make Telecommuting a Realistic Option? | Portion of Workforce |
|---|---|
| Yes, every day | 3,460 (8%) |
| Yes, several days a week | 8,521 (20%) |
| Yes, random days | 12,918 (30%) |
| No | 18,601 (43%) |

## PORTFOLIO BUILDER

**11-23. Message Strategies: Analytical Reports [LO-1] [LO-5]** As a college student and an active consumer, you may have considered one or more of the following questions at some point in the past few years:

- What criteria distinguish the top-rated MBA programs in the country? How well do these criteria correspond to the needs and expectations of business? Are the criteria fair for students, employers, and business schools?
- Which of three companies you might like to work for has the strongest corporate ethics policies?

- What will the music industry look like in the future? What's next after online stores such as Apple's iTunes and digital players such as the iPod?
- Which industries and job categories are forecast to experience the greatest growth—and therefore the greatest demand for workers—in the next 10 years?
- What has been the impact of Starbucks's aggressive growth on small, independent coffee shops? On midsized chains or franchises? In the United States or in another country?
- How large is the "industry" of major college sports? How much do the major football or basketball programs contribute—directly or indirectly—to other parts of a typical university?
- How much have minor league sports—baseball, hockey, arena football—grown in small- and medium-market cities? What is the local economic impact when these municipalities build stadiums and arenas?

**Your task:** Answer one of the preceding questions using secondary research sources for information. Be sure to document your sources, using the format your instructor indicates. Give conclusions and offer recommendations where appropriate.

### PORTFOLIO BUILDER

**11-24. Message Strategies: Analytical Reports** An observer surveying the current consumer electronics landscape and seeing Apple products everywhere might be surprised to learn that during part of the company's history, it was regarded by some as a fairly minor player in the computer industry—and at times a few pundits even wondered whether the company would survive.

**Your task:** In a two- to three-page report, identify the reasons Apple has been successful and explain how other companies can apply Apple's strategies and tactics to improve their business results.

**Proposals**

### PORTFOLIO BUILDER

**11-25. Message Strategies: Proposals [LO-1] [LO-5]** Presentations can make—or break—both careers and businesses. A good presentation can bring in millions of dollars in new sales or fresh investment capital. A bad presentation might cause any number of troubles, from turning away potential customers to upsetting fellow employees to derailing key projects. To help business professionals plan, create, and deliver more effective presentations, you offer a three-day workshop that covers the essentials of good presentations:

- Understanding your audience's needs and expectations
- Formulating your presentation objectives
- Choosing an organizational approach
- Writing openings that catch your audience's attention
- Creating effective graphics and slides
- Practicing and delivering your presentation
- Leaving a positive impression on your audience
- Avoiding common mistakes with presentation slides
- Making presentations online using webcasting tools
- Handling questions and arguments from the audience
- Overcoming the top 10 worries of public speaking (including *How can I overcome stage fright?* and *I'm not the performing type; can I still give an effective presentation?*)

**Workshop benefits.** Students will learn how to prepare better presentations in less time and deliver them more effectively.

**Who should attend.** Top executives, project managers, employment recruiters, sales professionals, and anyone else who gives important presentations to internal or external audiences.

**Your qualifications.** 18 years of business experience, including 14 years in sales and 12 years of public speaking. Experience speaking to audiences as large as 5,000 people. More than a dozen speech-related articles published in professional journals. Have conducted successful workshops for nearly 100 companies.

**Workshop details.** Three-day workshop (9 A.M. to 3:30 P.M.) that combines lectures, practice presentations, and both individual and group feedback. Minimum number of students: 6. Maximum number of students per workshop: 12.

**Pricing.** The cost is $3,500, plus $100 per student; 10 percent discount for additional workshops.

**Other information.** Each attendee will have the opportunity to give three practice presentations that will last from 3 to 5 minutes. Everyone is encouraged to bring PowerPoint files containing slides from actual business presentations. Each attendee will also receive a workbook and a digital video recording of his or her final class presentation on DVD. You'll also be available for phone or email coaching for six months after the workshop.

**Your task:** Identify a company in your local area that might be a good candidate for your services. Learn more about the company by visiting its website so you can personalize your proposal. Using the information listed above, prepare a sales proposal that explains the benefits of your training and what students can expect during the workshop.

### PORTFOLIO BUILDER

**11-26. Message Strategies: Proposals [LO-1] [LO-5]** For years, a controversy has been brewing over the amount of junk food and soft drinks being sold through vending machines in local schools. Schools benefit from revenue-sharing arrangements, but many parents and health experts are concerned about the negative effects of these snacks and beverages. You and your brother have almost a decade of experience running espresso and juice stands in malls and on street corners, and you'd love to find some way to expand your business into schools. After a quick brainstorming session, the two of you craft a plan that makes good business sense while meeting the financial concerns of school administrators and the nutritional concerns of parents and dietitians. Here are the notes from your brainstorming session:

- Set up portable juice bars on school campuses, offering healthy fruit and vegetable drinks along with simple, healthy snacks
- Offer schools 30 percent of profits in exchange for free space and long-term contracts
- Provide job-training opportunities for students (during athletic events, etc.)
- Provide detailed dietary analysis of all products sold
- Establish a nutritional advisory board composed of parents, students, and at least one certified health professional
- Assure schools and parents that all products are safe (e.g., no stimulant drinks, no dietary supplements)

- Support local farmers and specialty food preparers by buying locally and giving these vendors the opportunity to test-market new products at your stands

**Your task:** Based on the ideas listed, draft a formal proposal to the local school board, outlining your plan to offer healthier alternatives to soft drinks and prepackaged snack foods. Invent any details you need to complete your proposal.

### PORTFOLIO BUILDER/TEAM SKILLS

**11-27. Message Strategies: Proposals [LO-1] [LO-5]** It seems like everybody in your firm is frustrated. On the one hand, top executives complain about the number of lower-level employees who want promotions but just don't seem to "get it" when it comes to dealing with customers and the public, recognizing when to speak out and when to be quiet, knowing how to push new ideas through the appropriate channels, and performing other essential but difficult-to-teach tasks. On the other hand, ambitious employees who'd like to learn more feel that they have nowhere to turn for career advice from people who've been there. In between, a variety of managers and midlevel executives are overwhelmed by the growing number of mentoring requests they're getting, sometimes from employees they don't even know.

You've been assigned the challenge of proposing a formal mentoring program—and a considerable challenge it is:

- The number of employees who want mentoring relationships far exceeds the number of managers and executives willing and able to be mentors; how will you select people for the program?
- The people most in demand for mentoring also tend to be some of the busiest people in the organization.
- After several years of belt tightening and staff reductions, the entire company feels overworked; few people can imagine adding another recurring task to their seemingly endless to-do lists.
- What's in it for the mentors? Why would they be motivated to help lower-level employees?
- How will you measure the success or failure of the mentoring effort?

**Your task:** With a team assigned by your instructor, identify potential solutions to the issues (make up any information you need) and draft a proposal to the executive committee for a formal, companywide mentoring program that would match selected employees with successful managers and executives.

## Improve Your Grammar, Mechanics, and Usage

You can download the text of this assignment from http://real-timeupdates.com/bce7; click on Student Assignments and then click on Chapter 11. Improve Your Grammar, Mechanics, and Usage.

### Level 1: Self-Assessment—Quotation Marks, Parentheses, Ellipses, Underscores, and Italics

Review Sections 2.10, 2.11, 2.12, and 3.2 in the Handbook of Grammar, Mechanics, and Usage.

For the following items, insert quotations marks, parentheses, and ellipses as needed, and add italics wherever necessary.

**11-28.** Be sure to read How to Sell by Listening in this month's issue of Fortune.
**11-29.** Her response see the attached memo is disturbing.
**11-30.** Contact is an overused word.
**11-31.** We will operate with a skeleton staff during the holiday break December 21 through January 2.
**11-32.** The SBP's next conference, the bulletin noted, will be held in Minneapolis.
**11-33.** Sara O'Rourke a reporter from The Wall Street Journal will be here on Thursday.
**11-34.** I don't care why you didn't fill my order; I want to know when you'll fill it.
**11-35.** The term up in the air means undecided.
**11-36.** Her assistant the one who just had the baby won't be back for four weeks.
**11-37.** Ask not what your country can do for you is the beginning of a famous quotation from John F. Kennedy.
**11-38.** Whom do you think Time magazine will select as its Person of the Year?
**11-39.** Do you remember who said And away we go?
**11-40.** Refinements in robotics may prove profitable. More detail about this technology appears in Appendix A.
**11-41.** The resignation letter begins Since I'll never regain your respect and goes on to explain why that's true.
**11-42.** You must help her distinguish between i.e. which means that is and e.g. which means for example.

### Level 2: Workplace Applications

The following items may contain errors in grammar, capitalization, punctuation, abbreviation, number style, word division, and vocabulary. Rewrite each sentence, correcting all errors. If a sentence has no errors, write "Correct" for that number.

**11-43.** For the lst time, thank's to largely deals with the big chains like Stop & Shop, Sheila's Snak Treetz are showing a profit.
**11-44.** The premise for broadband, sometimes called simply 'high speed Internet', is that consumers need a more fast pipeline for getting digital information in our homes.
**11-45.** After moving into they're own factory, the Anderson's found theirselves in the market for an oven with airflow controls.
**11-46.** Cash-strapped entrepreneurs have learned penny-pinching, cost-cutting, credit-stretching techniques.
**11-47.** Designs in the Rough send out some 7 million catalogs a year yet until recently the company did'nt need a warehouse and they hadn't hardly any carrying costs.
**11-48.** Blockbuster estimates that 70 percent of the US population live within a 10 minute drive of a Blockbuster store.
**11-49.** Nestle Waters North America are the exclusive importer of globally-recognized brands such as: Perrier and Vittel from France and, S. Pelligrino from Italy,
**11-50.** The U.S. hispanic community; the largest Minority Group in the country; commands a impressive total purchasing power estimated at more than $500 billion dollars.

**11-51.** We conducted a six-month pilot in Chicago, to insure the affectiveness of the program.
**11-52.** A series of 7-Eleven television spots help make the term brain freeze part of every day American language.
**11-53.** The ad agencies accounts include the following consumer-brands; Walmart, Southwest airlines, FedEx, Land Rover, and Krispy Kreme.
**11-54.** PetSmart allows pets and their humans to together stroll the aisles of its stores; the number one Specialty Retailer of pet supplies.
**11-55.** Signature Fruit Co. has confirmed its closing it's Gridley, CA peach plant this Fall.
**11-56.** To unite the company's 91 franchisees around a common corporate identity WingsToGo have setup a corporate intranet.
**11-57.** It would be well for you to contract with an Internet service provider—a ISP to both run and to maintain your website.

### Level 3: Document Critique

The following document may contain errors in grammar, capitalization, punctuation, abbreviation, number style, word division, and vocabulary. As your instructor indicates, photocopy this page and correct all errors using standard proofreading marks (see Appendix C) or download the document and make the corrections in your word processing software.

Memco Construction 187 W. Euclid Avenue, Glenview, ILL 60025

www.memco.com

April 19, 2015

PROJECT: IDOT Letting Item #83 Contract No. 79371
DuPage County

Dear Mr. Estes—

Memco Construction is pleased to submit a road construction proposal for the above project. Our company has been providing quality materials and subcontracting services for highway reconstruction projects for over twenty-three years. Our most recent jobs in Illinois have included Illinois State Route 60 resurfacing, and reconstructing Illinois tollway 294.

Should you have any questions about this proposal please contact me at the company 847-672-0344, extension #30) or by email at kbeirsdorf@memcocon.com.

Based on the scope of the work outlined: the total cost of this job is projected by us to run ninety-nine thousand, two hundred eighty-three dollars. Because material quantities can vary once a project gets underway a separate page will be attached by us to this letter detailing our per-unit fees. Final charges will be based on the exact quantity of materials used for the job, and anything that accedes this estimate will be added of course.

Our proposal assumes that the following items will be furnished by other contractors (at no cost to Memco). All forms, earthwork and clearing; All prep work; Water at project site; Traffic control setup, devices, and maintenance—Location for staging, stockpiling, and storing material and equipment at job sight.

If we win this bid, we are already to begin when the apropriate contracts have been signed by us and by you.

If you've have any questions, contact me at the phone number listed below.

Sincerely,

Kris Beiersdorf
Memco Construction
Office: (847) 352-9742, ext. 30
Fax: (847) 352-6595
Email: kbeiersdorf@memco.com

MyBCommLab

Go to **mybcommlab.com** for the following Assisted-graded writing questions:

**11-58.** Why is it important to write clear, descriptive headings and link titles with online content, as opposed to clever, wordplay headings? [LO-2]
**11-59.** For providing illustration in a report or proposal, when is a diagram a better choice than a photograph? [LO-3]

## Endnotes

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# 12 Developing and Delivering Business Presentations

## LEARNING OBJECTIVES

After studying this chapter, you will be able to

1. Highlight the importance of presentations in your business career, and explain how to adapt the planning step of the three-step process to presentations
2. Describe the tasks involved in developing a presentation
3. Describe the six major design and writing tasks required to enhance your presentation with effective visuals
4. Outline three special tasks involved in completing a presentation
5. Describe four important aspects of delivering a presentation in today's social media environment



## Communication Matters . . .

"Successful speakers think about barriers. To connect with an audience, you must remove the many barriers that could interfere with the link between you and your audience."
—Dr. Marc S. Friedman, public speaking coach

With more than 30 years of experience in public speaking, teaching, and training, Marc Friedman has witnessed many technological changes that have transformed oral presentations. Although the right tools used in the right way can help a speaker build a strong connection with the audience, too often the technology gets in the way. Friedman says that holding an audience's attention is challenging enough in the best of circumstances, so any kind of communication barrier—from poorly designed slides to distracting laser pointers to excessive reliance on visual aids—makes the challenge that much greater. By all means, use the latest presentation tools whenever they can help, but don't let them interfere with the conversation you want to have with your audience.[1]

ACE STOCK LIMITED/Alamy

In any public speaking or presentation situation, try to remove the barriers that can prevent you from connecting with your audience.

## Planning a Presentation

**1 LEARNING OBJECTIVE** Highlight the importance of presentations in your business career, and explain how to adapt the planning step of the three-step process to presentations.

Presentations, delivered in person or online, offer important opportunities to put all your communication skills on display, including research, planning, writing, visual design, and interpersonal and nonverbal communication. Presentations also let you demonstrate your ability to think on your feet, grasp complex business issues, and handle challenging situations—all attributes that executives look for when searching for talented employees to promote.

Presentations involve all of your communication skills, from research through nonverbal communication.

Planning presentations is much like planning other business messages: You analyze the situation, gather information, select the best media and channels, and organize the information (see Figure 12.1). Gathering information for presentations is essentially the same as it is for written communication projects. The other three planning tasks have some special applications when it comes to oral presentations; they are covered in the following sections.

Creating a high-quality presentation for an important event can take many days, so be sure to allow enough time.

On the subject of planning, be aware that preparing a professional-quality business presentation can take a considerable amount of time. Nancy Duarte, whose design firm has years of experience creating presentations for corporations, offers this rule of thumb: For a one-hour presentation, allow 36 to 90 hours to research, conceive, create, and practice.[2] Not every one-hour presentation justifies a week or two of preparation, of course, but the important presentations that can make your career or your company certainly can.

**1 Plan →**

**Analyze the Situation**
Define your purpose and develop a profile of your audience, including their likely emotional states and language preferences.

**Gather Information**
Determine audience needs and obtain the information necessary to satisfy those needs.

**Choose Medium and Channel**
Identify the best combination for the situation, message, and audience, including handouts and other support materials.

**Organize the Information**
Define your main idea, limit your scope and verify timing, select the direct or indirect approach, and outline your content.

**2 Write →**

**Adapt to Your Audience**
Adapt your content, presentation style, and room setup to the audience and the specific situation. Be sensitive to audience needs and expectations with a "you" attitude, politeness, positive emphasis, and bias-free language. Plan to establish your credibility as required.

**Compose Your Presentation**
Outline an attention-getting introduction, body, and close. Prepare supporting visuals and speaking notes.

**3 Complete**

**Revise the Message**
Evaluate your content and speaking notes.

**Master Your Delivery**
Choose your delivery mode and practice your presentation.

**Prepare to Speak**
Verify facilities and equipment, including online connections and software setups. Hire an interpreter if necessary.

**Overcome Anxiety**
Take steps to feel more confident and appear more confident on stage.

**Figure 12.1 The Three-Step Process for Developing Oral and Online Presentations**
Although you rarely "write" a presentation or speech in the sense of composing every word ahead of time, the tasks in the three-step writing process adapt quite well to the challenge of planning, creating, and delivering oral and online presentations.

**TABLE 12.1 Analyzing Audiences for Business Presentations**

| Task | Actions |
|---|---|
| To determine audience size and composition | • Estimate how many people will attend (in person and online).<br>• Identify what they have in common and how they differ.<br>• Analyze the mix of organizational position, professions, language fluencies, and other demographic factors that could influence your content and delivery choices. |
| To predict the audience's probable reaction | • Analyze why audience members are attending the presentation.<br>• Determine the audience's general attitude toward the topic: interested, moderately interested, unconcerned, open-minded, or hostile.<br>• Analyze your audience's likely mood when you speak to them.<br>• Find out what kind of supporting information will help the audience accept and respond to your message: technical data, historical information, financial data, demonstrations, samples, and so on.<br>• Consider whether the audience has any biases that might work against you.<br>• Anticipate possible objections or questions. |
| To gauge the audience's experience | • Analyze whether everybody has the same background and level of understanding.<br>• Determine what the audience already knows about the subject.<br>• Consider whether the audience is familiar with the vocabulary you intend to use.<br>• Analyze what the audience expects from you.<br>• Think about the mix of general concepts and specific details you will need to present. |

## ANALYZING THE SITUATION

As with written communications, analyzing the situation involves defining your purpose and developing an audience profile (see Table 12.1). The purpose of most of your presentations will be to inform or to persuade, although you may occasionally need to make a collaborative presentation, such as when you're leading a problem-solving or brainstorming session.

In addition to following the audience analysis advice in Chapter 3, try to anticipate the likely emotional state of your audience members. Figure 12.2 on the next page offers tips for dealing with a variety of audience mindsets.

As you analyze the situation, also consider the circumstances. If some or all of the audience members will be in the same room with you, how will they be seated? Can you control the environment to minimize distractions? What equipment will you need? If some or all of your audience members will be online, how will the meeting system you're using affect their ability to hear and see you and your presentation materials? Such variables can influence not only the style of your presentation but the content itself.

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**Dealing with the difficult four**

Get advice on dealing with four difficult audience members: the Resister, the Expert, the Dominator, and the Rambler. Go to **http://real-timeupdates.com/bce7.** Under "Students," click on "Learn More."

Try to learn as much as you can about the setting and circumstances of your presentation, from the size of the audience to seating arrangements.

## SELECTING THE BEST MEDIA AND CHANNELS

For some presentations, you'll be expected to use whatever media and channels your audience, your boss, or the circumstances require. For example, you might be required to use specific presentation software and a conference room's built-in display system or your company's online meeting software.

For other presentations, though, you might be able to choose from an array of presentation modes, from live, in-person presentations to *webcasts* (online presentations that people either view live or download later from the web), screencasts (recordings of activity on computer displays with audio voiceover), or *twebinars* (the use of Twitter as a *backchannel*—see page 373—for real-time conversation during a web-based seminar[3]).

**REAL-TIME UPDATES**
LEARN MORE BY WATCHING THIS VIDEO

**Nancy Duarte's five rules for presentations**

Follow these steps distilled from Duarte's decades of experience crafting presentations for major corporations. Go to **http://real-timeupdates.com/bce7.** Under "Students," click on "Learn More."

## ORGANIZING A PRESENTATION

The possibilities for organizing a business presentation fall into two basic categories, *linear* or *nonlinear*. Linear presentations are like printed documents in the sense that they are

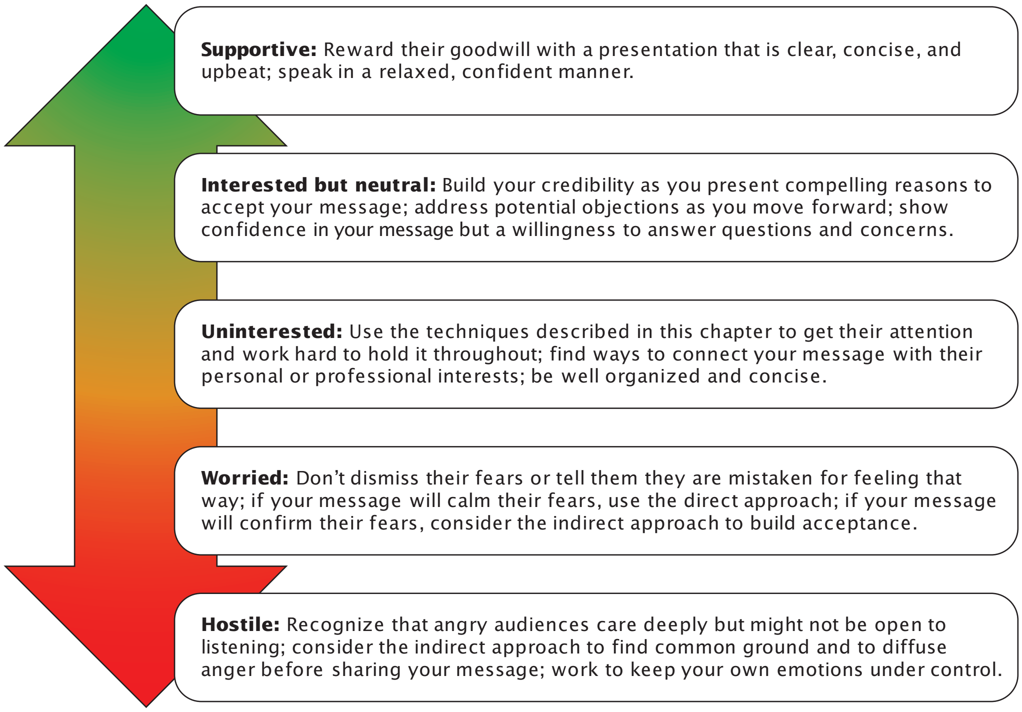


**Figure 12.2 Planning for Various Audience Mindsets**
Try to assess the emotional state of your audience ahead of time so you can plan your presentation approach accordingly.

Linear presentations generally follow a fixed path or from start to finish.

outlined like conventional messages and follow a predefined flow from start to finish. The linear model is appropriate for speeches, technical and financial presentations, and other presentations in which you want to convey your message point by point or build up to a conclusion following logical steps.

Nonlinear presentation can move back and forth between topics and up and down in levels of detail.

In contrast, a nonlinear presentation doesn't flow in any particularly direction but rather gives the presenter the option to move back and forth between topics and up and down in terms of level of detail. Nonlinear presentations can be useful when you want to be able to show complicated relationships between multiple ideas or elements, to zoom in and out between the "big picture" and specific details, to explore complex visuals, or to have the flexibility to move from topic to topic in any order.

The difference between the two styles can be seen in the type of software typically used to create and deliver a presentation. Microsoft PowerPoint, Apple Keynote, and similar packages use sequences of individual slides, often referred to as a *slide deck*. They don't necessarily need to be presented in a strict linear fashion, because the presenter does have the option of jumping out of the predefined order, but in most presentations using slides the speaker moves from start to finish in that order.

Prezi is the best-known nonlinear presentation software and doesn't use the concept of individual slides. Instead, you start from a main screen, or canvas, which often presents the big-picture overview of your topic. From there, you add individual objects (including blocks of text, photos, or videos) that convey specific information points. When you present, you can zoom in and out, discussing the individual objects and their relationship to the big picture and to each other. You can also establish a narrative flow by defining a path from one object to the next, which also lets people view the presentation on their own[4] (and effectively turns a Prezi presentation into a linear presentation).

That presentations—using any software or system—are not about flash and dazzle; they are about sharing ideas, information, and emotions with your audience.

Prezi is sometimes viewed as a more dynamic and engaging way to present, and it certainly has that potential. However, keep several points in mind if you have a choice of which approach to take and which software to use. First, match the tool to the task, not the other way around. A detailed technical discussion might need a linear presentation, whereas a free-form brainstorming session might benefit from a nonlinear approach. Second, if they are used well, software features can help you tell your story, but your story is what matters—not the software. If they are used poorly, software features only get in the way. (Overuse of zooming in Prezi is a good example.[5]) Third, in spite of their reputation, PowerPoint and other slide programs aren't limited to creating boring, linear flows of bullet points (see "Choosing Structured or Free-Form Slides" on page 363).

### Defining Your Main Idea

Regardless of which overall approach you take, a successful presentation starts with a clear statement of the main idea you want to share with your audience. Start by composing a one-sentence summary that links your subject and purpose to your audience's frame of reference. Here are some examples:

If you can't express your main idea in a single sentence, you probably haven't defined it clearly enough.

> Convince management that reorganizing the technical support department will improve customer service and reduce employee turnover.
>
> Convince the board of directors that we should build a new plant in Texas to eliminate manufacturing bottlenecks and improve production quality.
>
> Address employee concerns regarding a new health-care plan by showing how the plan will reduce costs and improve the quality of their care.

Each of these statements puts a particular slant on the subject, one that directly relates to the audience's interests. By focusing on your audience's needs and using the "you" attitude, you help keep their attention and convince them your points are relevant.

### Limiting Your Scope

Limiting your scope is important with any message, but it's particularly vital with presentations, for two reasons. First, for most presentations, you must work within strict time limits. Second, the longer you speak, the more difficult it is to hold the audience's attention levels, and the more difficult it is for your listeners to retain your key points.[6]

Limiting you scope ensures that your presentation fits the allotted time and your content meets audience needs and expectations.

The only sure way to know how much material you can cover in a given time is to practice your presentation after you complete it. As an alternative, if you're using conventional structured slides (see page 363), you can figure on 3 or 4 minutes per slide as a rough guide.[7] Of course, be sure to factor in time for introductions, coffee breaks, demonstrations, question-and-answer sessions, and anything else that takes away from your speaking time.

The only sure way to measure the length of your presentation is to complete a practice run.

Approaching time constraints as a creative challenge can actually help you develop more effective presentations. Limitations can force you to focus on the most essential message points that are important to your audience.[8]

### Choosing Your Approach

With a well-defined main idea to guide you and a clear notion of the scope of your presentation, you can begin to arrange your message. If you have 10 minutes or less, consider organizing your presentation much as you would a letter or other brief message: Use the direct approach if the subject involves routine information or good news, and use the indirect approach if the subject involves bad news or persuasion. Plan your introduction to arouse interest and to give a preview of what's to come. For the body of the presentation, be prepared to explain the who, what, when, where, why, and how of your subject. In the final section, review the points you've made and close with a statement that will help your audience remember the subject of your speech (see Figure 12.3 on the next page).

Organize short presentations the same way you would a letter or brief memo; organize long presentations as you would a report or proposal.

Longer presentations are often organized more like reports. If the purpose is to motivate or inform, you'll typically use the direct approach and a structure imposed naturally by the subject: comparison, importance, sequence, chronology, geography, or category (as discussed in Chapter 10). If your purpose is to analyze, persuade, or collaborate, organize your material around conclusions and recommendations or around a logical argument. Use the direct approach if the audience is receptive and the indirect approach if you expect resistance.

No matter what the length, look for opportunities to integrate storytelling into the structure of your presentation. The dramatic tension (not knowing what will happen to the "hero") at the heart of effective storytelling is a great way to capture and keep the audience's attention.

Using a storytelling model can be a great way to catch and hold the audience's attention.

**Progress Update: August 2015**

**Purpose:** To update the Executive Committee on our product development schedule.

I. Review goals and progress.
  A. Mechanical design:
    1. Goal: 100%
    2. Actual: 80%
    3. Reason for delay: Unanticipated problems with case durability
  B. Software development:
    1. Goal: 50%
    2. Actual: 60%
  C. Material sourcing:
    1. Goal: 100%
    2. Actual: 45% (and materials identified are at 140% of anticipated costs)
    3. Reason for delay: Purchasing is understaffed and hasn't been able to research sources adequately.

II. Discuss schedule options.
  A. Option 1: Reschedule product launch date.
  B. Option 2: Launch on schedule with more expensive materials.

III. Suggest goals for next month.

IV. Q&A

MyBCommLab Apply Figure 12.3's key concepts by going to **mybcommlab.com**

**Figure 12.3 Effective Outline for a 10-Minute Presentation**
Here is an outline of a short presentation that updates management on the status of a key project; the presenter has some bad news to deliver, so she opted for an indirect approach to lay out the reasons for the delay before sharing the news of the schedule slip.

## Preparing Your Outline

In addition to planning your speech, a presentation outline helps you plan your speaking notes.

An outline helps you organize your message, and it serves as the foundation for delivering your speech. Prepare your outline in several stages:[9]

- State your purpose and main idea, and then use these elements to guide the rest of your planning.
- Organize your major points and subpoints in logical order, expressing each major point as a single, complete sentence.
- Identify major points in the body first, then outline the introduction and close.
- Identify transitions between major points or sections, then write these transitions in full-sentence form.
- Prepare your bibliography or source notes; highlight those sources you want to identify by name during your talk.
- Choose a compelling title. Make it brief, action oriented, and focused on what you can do for the audience.[10]

You may find it helpful to create a simpler speaking outline from your planning outline.

Many speakers like to prepare both a detailed *planning outline* (see Figure 12.4) and a simpler *speaking outline* that provides all the cues and reminders they need in order to present their material. To prepare an effective speaking outline, follow these steps:[11]

- Start with the planning outline and then strip away anything you don't plan to say directly to your audience.
- Condense points and transitions to key words or phrases.
- Add delivery cues, such as places where you plan to pause for emphasis or use visuals.
- Arrange your notes on numbered cards or use the notes capability in your presentation software.

A clear statement of purpose helps the presenter stay focused on her message while she develops her outline.

**OUR TRAVEL AND ENTERTAINMENT COSTS ARE OUT OF CONTROL**

**Purpose:** To explain why Electrovision's travel and entertainment (T&E) costs are so high and to propose a series of changes to bring them under control.

**INTRODUCTION**

I. Our T&E costs are way above average, and they pose a threat to the company's financial health; fortunately, we can fix the problem in four straightforward steps that could save as much as $6 million a year.

II. How we approached the investigation
   A. We analyzed internal expense reports.
   B. We compared our cost data with nationwide averages.
   C. We analyzed published information on trends and cost-control suggestions.

(Transition: This presentation reviews Electrovision's spending patterns, analyzes the impact on company profits, and recommends four steps for reducing the budget.)

The introduction starts by highlighting the problem she will address.

The introduction continues with a description of the investigation she undertook; this will enhance her credibility by showing that the research was thorough and objective.

**BODY**

I. Analysis of spending patterns
   A. The amount we've been spending on T&E:
      1. Airfares, hotels, rental cars, restaurants, and entertainment totaled $16 million last year.
      2. T&E budget increased by 12 percent per year for the past five years.
   B. Where the money goes:
      1. We took 3,390 trips last year at an average cost per trip of $4,725.
      2. Airfares and lodging represent 70 percent of T&E expenses.
   C. How our spending compares with national averages:
      1. Facilities and customers spread from coast to coast force us to spend a lot on travel.
      2. However, we spend 125 percent more than the national average for every day of travel. (Source: Dow Jones)
   D. Why do we spend so much?
      1. First-class travel has been viewed as compensation for the demands of extensive travel.
      2. The sales staff is encouraged to entertain clients.
      3. T&E costs are hard for managers to view and study.
      4. No one has central responsibility for controlling costs.

(Transition: We need to control spending for two reasons: (1) profits are projected to be flat or declining over the next two years, and (2) hotel rates and airfares continue to rise sharply.)

The organization of the body is clear and logical, moving from one key point to the next.

Part I of the body identifies the nature, scope, and causes of the problem.

MyBCommLab Apply Figure 12.4's key concepts by going to **mybcommlab.com**

**Figure 12.4 Effective Outline for a 30-Minute Presentation** ***(continued)***
This outline clearly identifies the purpose and the distinct points to be made in the introduction, body, and close. Notice also how the speaker has written her major transitions in full-sentence form to be sure she can clearly phrase these critical passages when it's time to speak.

# Developing a Presentation

Although you usually don't write out a presentation word for word, you still engage in the writing process—developing your ideas, structuring support points, phrasing your transitions, and so on. Depending on the situation and your personal style, the eventual presentation might follow your initial words closely, or you might express your thoughts in fresh, spontaneous language.

2 LEARNING OBJECTIVE
Describe the tasks involved in developing a presentation.

## ADAPTING TO YOUR AUDIENCE

The size of your audience, the venue (in person or online), your subject, your purpose, your budget, and the time available for preparation all influence the style of your presentation. If you're speaking to a small group, particularly people you already know, you can use a casual style that encourages audience participation. A small conference room, with your audience seated around a table, may be appropriate. Use simple visuals and invite your audience to interject comments. Deliver your remarks in a conversational tone, using notes to jog your memory if necessary.

Adapting to your audience involves a number of issues, from speaking style to technology choices.

II. Impact on profits

A. T&E costs continue to rise, as do other company costs.
B. Revenue is projected to decline in coming years.
C. Bottom line: We're headed for trouble.

(Transition: By implementing a number of reforms, management can expect to reduce Electrovision's T&E budget by as much as 40 percent. We can cut expenses in four ways.)

III. Solution

A. We should institute tighter spending controls:
1. Hire a travel manager to control costs and negotiate group discounts.
2. Develop a formal, written policy to contain costs.
3. Give departmental managers the data they need to make smarter decisions.

B. We can reduce unnecessary travel and entertainment costs:
1. Cut down on discretionary trips (seminars, etc.).
2. Reduce the number of intracompany trips and employees sent on each trip.
3. Encourage employees to economize.

C. We can find lower travel rates:
1. Negotiate corporate discounts.
2. Plan trips more carefully to take advantage of lower fares.

D. We can replace some travel with technological alternatives:
1. Conference calls
2. Videoconferences
3. Other possibilities

E. Potential impact of all these changes: As much as $6 million in reduced costs (Source: American Express)

(Transition: This presentation reviews Electrovision's spending patterns, analyzes the impact on company profits, and recommends four steps for reducing the budget.)

**CLOSE**

I. We spend more on T&E than we should

II. Four fairly obvious steps will yield significant cost savings

A. Establish tighter controls
B. Rein in unnecessary T&E costs
C. Find lower travel rates
D. Reduce travel by using technological alternatives

The logical organization continues throughout the body of her presentation.

Part II of the body emphasizes the seriousness of the problem.

Part III of the body provides the four-step solution mentioned in the introduction, then makes a recommendation for implementing the steps.

The close restates the four recommended steps.

**Figure 12.4** **Effective Outline for a 30-Minute Presentation (*continued*)**

**REAL-TIME UPDATES**

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**How to establish an emotional connection with any audience**

Entertainment executive Peter Guber talks about the art of purposeful storytelling. Go to **http://real-timeupdates.com/bce7.** Under "Students," click on "Learn More."

If you're addressing a large audience or if the event is important, establish a more formal atmosphere. During formal presentations, speakers are often on a stage or platform, standing behind a lectern and using a microphone so that their remarks can be heard throughout the room or captured for broadcasting or webcasting.

## CRAFTING PRESENTATION CONTENT

Like written documents, oral presentations are composed of distinct elements: the introduction, the body, and the close.

### Presentation Introduction

An effective introduction arouses interest in your topic, establishes your credibility, and prepares the audience for the body of your presentation.

A good introduction fires up the audience's interest in your topic, establishes your credibility, and prepares your listeners for the information and insights you have to share. That's a lot to accomplish in the first few minutes, so give yourself plenty of time to develop the words and visuals you'll use to get your presentation off to a great start.

**Getting Your Audience's Attention** Some subjects are naturally more interesting to some audiences than others. If your presentation involves the health, wealth, or happiness of your listeners, most people will be interested, regardless of how you begin. With other subjects, though, you need to use some imagination to pull people in. Here are six ways to arouse audience interest:[12]

Spend some time thinking about the best technique to capture the audience's attention and interest with your opening remarks.

- Unite the audience around a common goal.
- Tell a compelling story that illustrates an important and relevant point. If your entire presentation is structured as a story, of course, you'll want to keep the interest high by not giving away the ending yet.
- Pass around an example or otherwise appeal to listeners' senses.
- Ask a question that will get your audience thinking about your message.
- Share an intriguing, unexpected, or shocking detail.
- Open with an amusing observation about yourself, the subject matter of the presentation, or the circumstances surrounding the presentation—but make sure any humorous remarks are relevant, appropriate, and not offensive to anyone in the audience.

Regardless of which technique you choose, make sure you can give audience members a reason to care and to believe that the time they're about to spend listening to you will be worth their while.[13]

**Building Your Credibility** Audiences tend to decide within a few minutes whether you're worth listening to, so establishing your credibility quickly is vital.[14] If you're not a well-known expert or haven't already earned your audience's trust in other situations, you'll need to build credibility in your introduction. If someone else will introduce you, he or she can present your credentials. If you will be introducing yourself, keep your comments brief, but don't be afraid to mention your accomplishments. Your listeners will be curious about your qualifications, so tell them briefly who you are, why you're there, and how they'll benefit from listening to you. You might say something like this:

If someone else will be introducing you, ask this person to present your credentials.

> I'm Karen Whitney, a market research analyst with Information Resources Corporation. For the past five years, I've specialized in studying high-technology markets. Your director of engineering, John LaBarre, asked me to talk about recent trends in computer-aided design so that you'll have a better idea of how to direct your development efforts.

This speaker establishes credibility by tying her credentials to the purpose of her presentation. By mentioning her company's name, her specialization and position, and the name of the audience's boss, she lets her listeners know immediately that she is qualified to tell them something they need to know.

**Previewing Your Message** In addition to getting the audience's attention and establishing your credibility, a good introduction gives your audience a preview of what's ahead. Your preview should summarize the main idea of your presentation, identify major supporting points, and indicate the order in which you'll develop those points. By giving listeners the framework of your message, you help them process the information you'll be sharing, Of course, if you're using the indirect approach, you'll have to decide how much of your main idea to give away in the introduction.

Offer a preview to help your audience understand the importance, the structure, and the content of your message.

## Presentation Body

The bulk of your presentation is devoted to a discussion of the main points in your outline. No matter what organizational pattern you're using, your goals are to make sure that the organization is clear and that you hold the audience's attention.

**Connecting Your Ideas** In written documents, you can show how ideas are related with a variety of design clues: headings, paragraph indentions, white space, and lists. However, with oral communication—particularly when you aren't using visuals for support—you have to rely primarily on spoken words to link various parts and ideas.

For the links between sentences and paragraphs, use one or two transitional words: *therefore*, *because*, *in addition*, *in contrast*, *moreover*, *for example*, *consequently*, *nevertheless*, or *finally*.

Use transitions to repeat key ideas, particularly in longer presentations.

To link major sections of a presentation, use complete sentences or paragraphs, such as "Now that we've reviewed the problem, let's take a look at some solutions." Every time you shift topics, be sure to stress the connection between ideas by summarizing what's been said and previewing what's to come. The longer your presentation, the more important your transitions. Your listeners need clear transitions to guide them to the most important points. Furthermore, they'll appreciate brief interim summaries to pick up any ideas they may have missed.

**Holding Your Audience's Attention** A successful introduction will have grabbed your audience's attention; now the body of your presentation needs to hold that attention. Here are a few helpful tips for keeping the audience tuned into your message:

The most important way to hold an audience's attention is to show how your message relates to their individual needs and concerns.

- Keep relating your subject to your audience's needs.
- Anticipate—and answer—likely questions as you move along so people don't get confused or distracted.
- Use clear, vivid language and throw in some variety; repeating the same words and phrases over and over puts people to sleep.
- Show how your subject is related to ideas that audience members already understand, and give people a way to categorize and remember your points.[15]
- If appropriate, encourage participation by asking for comments or questions.
- Illustrate your ideas with visuals, which enliven your message, help you connect with audience members, and help them remember your message more effectively (see "Enhancing Your Presentation with Effective Visuals" on the next page).

## Presentation Close

Plan your close carefully so that your audience leaves with a clear summary of your main idea.

The close of a speech or presentation has two critical tasks to accomplish: making sure your listeners leave with the key points from your talk clear in their minds and putting your audience in the appropriate emotional state. For example, if the purpose of your presentation is to warn managers that their out-of-control spending threatens the company's survival, you want them to leave with that message ringing in their ears—and with enough concern for the problem to stimulate changes in their behavior.

When you repeat your main idea in the close, emphasize what you want your audience to do or to think.

**Restating Your Main Points** Use the close to succinctly restate your main points, emphasizing what you want your listeners to do or to think. For example, to close a presentation on your company's executive compensation program, you could repeat your specific recommendations and then conclude with a memorable statement to motivate your audience to take action:

> We can all be proud of the way our company has grown. However, if we want to continue that growth, we need to take four steps to ensure that our best people don't start looking for opportunities elsewhere:
>
> - First, increase the overall level of compensation
> - Second, establish a cash bonus program
> - Third, offer a variety of stock-based incentives
> - Fourth, improve our health insurance and pension benefits
>
> By taking these steps, we can ensure that our company retains the management talent it needs to face our industry's largest competitors.

Repetition of key ideas, as long as you don't overdo it, greatly improves the chance that your audience will hear your message in the way you intended.

Plan your final statement carefully so you can end on a strong, positive note.

**Ending with Clarity and Confidence** If you've been successful with the introduction and body of your presentation, your listeners now have the information they need, and they're in the right frame of mind to put that information to good use. Now you're ready to end on a strong note that confirms expectations about any actions or decisions that will follow the presentation—and to bolster the audience's confidence in you and your message one final time.

Some presentations require the audience to reach a decision or agree to take specific action, in which case the close should provide a clear wrap-up. If the audience reached agreement on an issue covered in the presentation, briefly review the consensus. If they didn't agree, make the lack of consensus clear by saying something like "We seem to have some fundamental disagreement on this question." Then be ready to suggest a method of resolving the differences.

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If you expect any action to occur as a result of your speech, be sure to identify who is responsible for doing what. List the action items and, if possible within the time you have available, establish due dates and assign responsibility for each task.

Make sure your final remarks are memorable and expressed in a tone that is appropriate to the situation. For example, if your presentation is a persuasive request for project funding, you might emphasize the importance of this project and your team's ability to complete it on schedule and within budget. Expressing confident optimism will send the message that you believe in your ability to perform. Conversely, if your purpose is to alert the audience to a problem or risk, false optimism will undermine your message.

Make sure your final remarks are memorable and have the right emotional tone.

Whatever final message is appropriate, think through your closing remarks carefully before stepping in front of the audience. You don't want to wind up on stage with nothing to say but "Well, I guess that's it."

# Enhancing Your Presentation with Effective Visuals

**3** LEARNING OBJECTIVE Describe the six major design and writing tasks required to enhance your presentation with effective visuals.

Slides and other visuals can improve the quality and impact of your presentation by creating interest, illustrating points that are difficult to explain in words alone, adding variety, and increasing the audience's ability to absorb and remember information.

You can select from a variety of visuals to enhance presentations. Don't overlook "old-school" technologies such as overhead transparencies, chalkboards, whiteboards, and flipcharts—they can all have value in the right circumstances. However, most business presentation visuals are created using Microsoft PowerPoint, Apple Keynote, or Google Documents for linear presentations and Prezi for nonlinear presentations. Presentations slides and "Prezis" are easy to edit and update; you can add sound, photos, video, and animation; they can be incorporated into online meetings, webcasts, and *webinars* (a common term for web-based seminars); and you can record self-running presentations for trade shows, websites, and other uses.

Thoughtfully designed visuals create interest, illustrate complex points in your message, add variety, and help the audience absorb and remember information.

Presentation slides are practically universal in business today, but their widespread use is not always welcome. You may have already heard the expression "death by PowerPoint," which refers to the agonizing experience of sitting through too many poorly conceived and poorly delivered slide shows. In the words of presentation expert and author Garr Reynolds, "most presentations remain mind-numbingly dull, something to be endured by presenter and audience alike."[16]

Focusing on making your presentations simple and authentic will help you avoid the "death by PowerPoint" stigma that presentations have in the mind of many professionals.

That's the bad news. The good news is that both linear and nonlinear presentations can provide an experience that is satisfying, and sometimes even enjoyable, for presenter and audience alike. Start with the mindset of *simplicity* (clear ideas presented clearly) and *authenticity* (talking *with* your audience about things they care about, rather than talking at them or trying to be a "performer"), and you'll be well on your way to becoming an effective presenter.

**MOBILE APPS**

With Apple Keynote, you can create and deliver presentations on your iOS mobile devices.

## CHOOSING STRUCTURED OR FREE-FORM SLIDES

For linear presentations, the most important design choice you face when creating slides is whether to use conventional, bullet point-intensive *structured slides* or the looser, visually oriented *free-form slides* that many presentation specialists now advocate. Compare the two rows of slides in Figure 12.5 on the next page. The structured slides in the top row follow the same basic format throughout the presentation. In fact, they're based directly on the templates built into PowerPoint, which tend to feature lots and lots of bullet points.

Structured slides are usually based on templates that give all the slides in a presentation the same general look (which usually involves a lot of bullet points); free-form slides are much less rigid and emphasize visual appeal.


Figure 12.5a


Figure 12.5b


Figure 12.5c

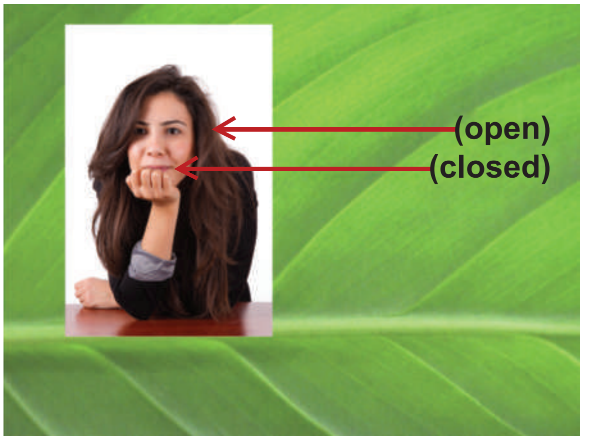


Figure 12.5d

**Figure 12.5 Structured Versus Free-Form Slide Design**
Compare the rigid, predictable design of the two slides in the top row with the more dynamic free-form designs in the bottom row. Although the two free-form slides don't follow the same design structure, they are visually linked by color and font choices. (Note that Figure 12.5d is a humorous way of conveying the first bullet point in Figure 12.5b.)

Free-form slides often have far less content per slide than structured designs, which requires many more slides to cover a presentation of equal length.

The free-form slides in the bottom row don't follow a rigid structure. However, free-form designs should not change randomly from one slide to the next. Effectively designed slides should still be unified by design elements such as color and font selections, as can be seen in Figures 12.5c and 12.5d. Also, note how Figure 12.5d combines visual and textual messages to convey the point about listening without criticizing. This complementary approach of pictures and words is a highlight of free-form design.

## Advantages and Disadvantages of Structured Slides

Structured slides are often the best choice for project updates and other routine information presentations, particularly if the slides are intended to be used only once.

Structured slides have the advantage of being easy to create; you simply choose an overall design scheme for the presentation, select a template for a new slide, and start typing. If you're in a schedule crunch, going the structured route might save the day because at least you'll have *something* ready to show. Given the speed and ease of creating them, structured slides can be a more practical choice for routine presentations such as project status updates.

Also, because more information can usually be packed on each slide, carefully designed structured slides can be more effective at conveying complex ideas or sets of interrelated data to the right audiences. For example, if you are talking to a group of executives who must decide where to make budget cuts across the company's eight divisions, at some point in the presentation they will probably want to see summary data for all eight divisions on a single slide for easy comparison. Such a slide would be overcrowded by the usual definition, but this might be the only practical way to get a "big-picture" view of the situation. (The best solution is probably some high-level, summary slides supported by a detailed handout, as "Creating Effective Handouts" on page 370 explains.)

The primary disadvantage of structured design is that mind-numbing effect Garr Reynolds describes, caused by text-heavy slides that all look alike. Slide after slide of dense, highly structured bullet points with no visual relief can put an audience to sleep.

### Advantages and Disadvantages of Free-Form Slides

Free-form slide designs can overcome the drawbacks of text-heavy structured design. Such slides can fulfill three criteria researchers have identified as important for successful presentations: (1) providing complementary information through both textual and visual means, (2) limiting the amount of information delivered at any one time to prevent cognitive overload, and (3) helping viewers process information by identifying priorities and connections, such as by highlighting the most important data points in a graph.[17] (Of course, well-designed structured slides can also meet these criteria, but the constraints of prebuilt templates make doing so more of a challenge.)

Well-designed free-form slides help viewers understand, process, and remember the speaker's message.

With appropriate imagery, free-form designs can also create a more dynamic and engaging experience for the audience. Given their ability to excite and engage, free-form designs are particularly good for motivational, educational, and persuasive presentations—particularly when the slides will be used multiple times and therefore compensate for the extra time and effort required to create them.

Free-form slides have several potential disadvantages, however. First, effectively designing slides with both visual and textual elements is more creatively demanding and more time-consuming than simply typing text into preformatted templates. The emphasis on visual content also requires more images, which take time to find.

Free-form slides can require more skill and time to create, and they put more demands on the speaker during the presentation.

Second, because far less textual information tends to be displayed on-screen, the speaker is responsible for conveying more of the content. Ideally, of course, this is how a presentation *should* work, but presenters sometimes find themselves in less-than-ideal circumstances, such as being asked to fill in for a colleague on short notice.

Third, if not handled carefully, the division of information into smaller chunks can make it difficult to present complex subjects in a cohesive, integrated manner. For instance, if you're discussing a business problem that has five interrelated causes, it might be helpful to insert a conventional bullet-point slide as a summary and reminder after discussing each problem on its own.

## DESIGNING EFFECTIVE SLIDES

Despite complaints about "death by PowerPoint," the problem is not with that software itself (or with Apple Keynote or any other presentation program). It is just a tool and, like other tools, can be used well or poorly. Unfortunately, lack of design awareness, inadequate training, schedule pressures, and the instinctive response of doing things the way they've always been done can lead to ineffective slides and lost opportunities to really connect with audiences. And although Prezi is sometimes promoted as the antidote to PowerPoint, using Prezi does not guarantee you'll end up with an effective presentation; it, too, can be misused and wind up creating a barrier between the speaker and the audience.

Use presentation software wisely to avoid the "death by PowerPoint" stigma that presentations have in the mind of many professionals.

Another reason for ineffective slides is the practice of treating slide sets as standalone documents that can be read on their own, without a presenter. (The emergence of websites such as SlideShare might be contributing to this problem, too, by making it so easy to share slide sets.) These "slideument" hybrids that try to function as both presentation visuals and printed documents don't work well as either: They often have too much information to be effective visuals and too little to be effective reports (in addition to being clumsy to read).

"Slideuments" are hybrids that try to function as both presentation slides and readable documents—and usually fail at both tasks.

As the section "Creating Effective Handouts" on page 370 explains, the ideal solution is to create an effective slide set and a separate handout document that provides additional details and supporting information. This way, you can optimize each piece to do the job it is really meant to do. An alternative is to use the notes field in your presentation software to include your speaking notes for each slide. Anyone who gets a copy of your slides can at least follow along by reading your notes, although you will probably need to edit and embellish them to make them understandable by others.

Rather than packing your slides with enough information to make them readable as standalone documents, complement well-designed slides with printed handouts.

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The free ebook and a pair of PowerPoint templates will help you make more-effective slide-document hybrids. Go to **http://real-timeupdates.com/bce7.** Under "Students," click on "Learn More."

However, if creating slideuments is your only option for some reason, be sure to emphasize clarity and simplicity. If you have to add more slides to avoid packing individual slides with too much text, by all means do so. Having a larger number of simpler slides is a better compromise all around than a smaller number of jam-packed slides. Remember that the primary purpose of the slides is supporting your presentation, so make sure your slides work well for that purpose.

## Designing Slides Around a Key Visual

Organizing a slide around a key visual can help the audience quickly grasp how ideas are related.

With any type of presentation, it is often helpful to structure specific slides around a key visual that helps organize and explain the points you are trying to make. For example, a pyramid suggests a hierarchical relationship, and a circular flow diagram emphasizes that the final stage in a process loops back to the beginning of the process. Figure 12.6 shows six of the many types of visual designs you can use to organize information on a slide.

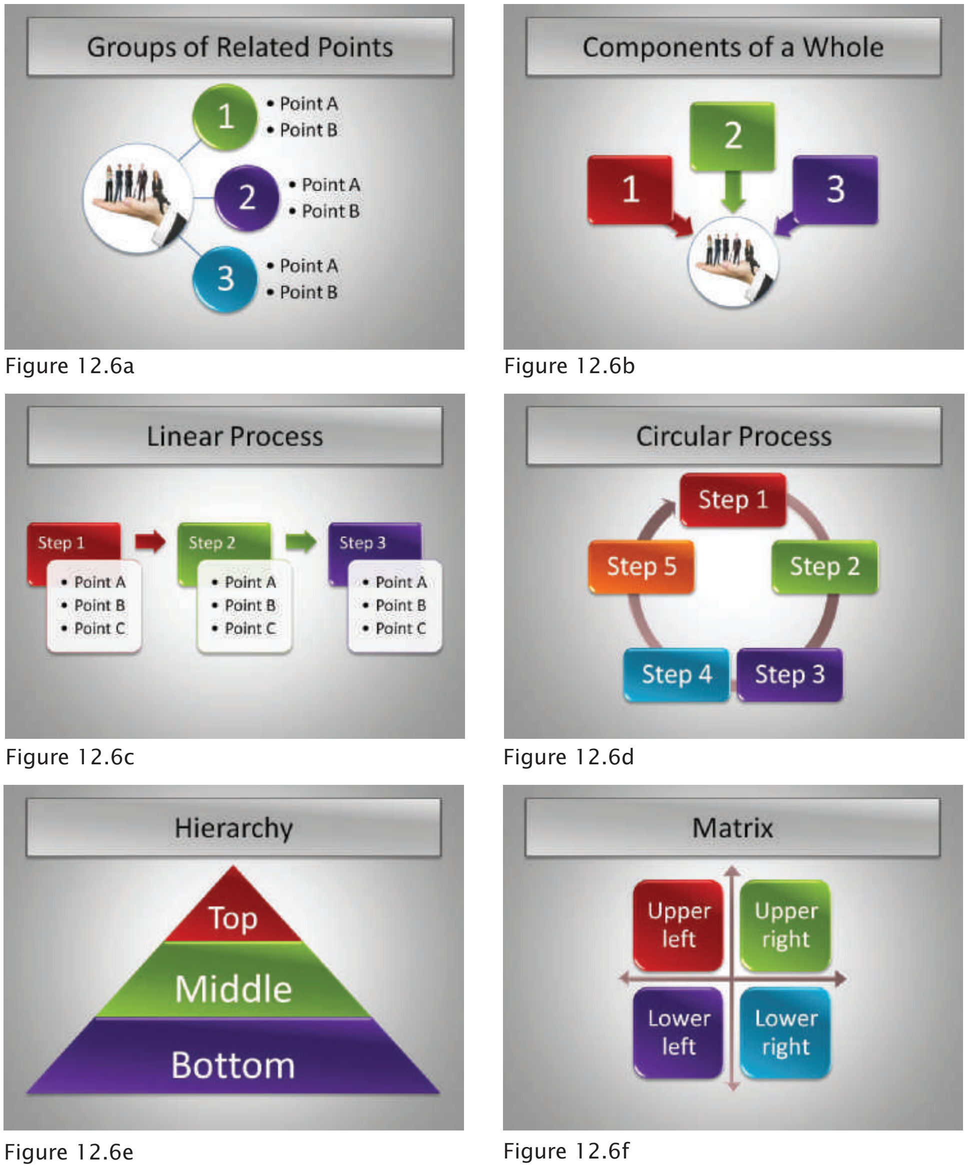


**Figure 12.6 Using a Key Visual to Organize Points on a Slide**

Simple graphical elements such as these "SmartArt" images in Microsoft PowerPoint make it easy to organize slide content using a key visual. Whether you're trying to convey the relationship of ideas in a hierarchy, a linear process, a circular process, or just about any other configuration, a key visual can work in tandem with your written and spoken messages to help audiences get your message.

## Writing Readable Content

One of the most common mistakes beginners make—and one of the chief criticisms leveled at structured slide designs in general—is stuffing slides with too much text. Doing so overloads the audience with too much information too fast, takes attention away from the speaker by forcing people to read more, and requires the presenter to use smaller type.

Effective text slides supplement your words and help the audience follow the flow of ideas (see Figure 12.7). Use text to highlight key points, summarize and preview your message, signal major shifts in thought, illustrate concepts, or help create interest in your spoken message.

Use slide text sparingly and only to emphasize key points, not to convey your entire message.

## Creating Charts and Tables for Slides

Charts and tables for presentations need to be simpler than visuals for printed documents. Detailed images that look fine on the printed page can be too dense and too complicated for presentations. Remember that your audience will view your slides from across the room—not from a foot or two away, as you do while you create them. Keep the level of detail to a minimum, eliminating anything that is not absolutely essential. If necessary, break information into more than one chart or table. It may also be useful to provide detailed versions of charts and tables in a handout.

Charts and tables for presentations need to be simpler than visuals for printed documents.

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authorSTREAM lets you replay webcasts and other recorded presentations on your mobile device.

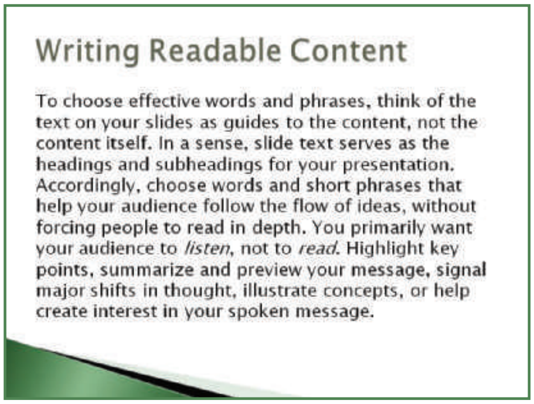


Figure 12.7a

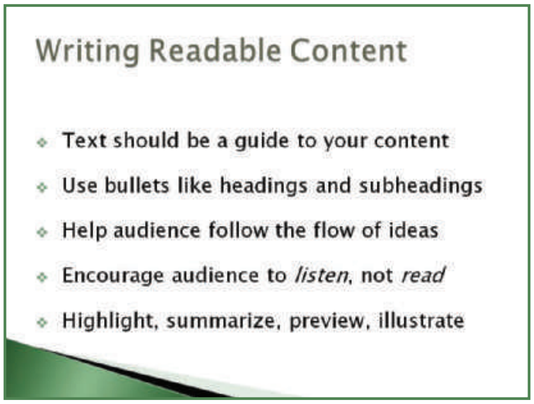


Figure 12.7b

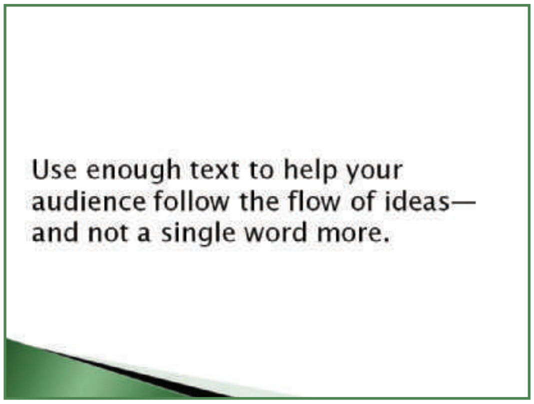


Figure 12.7c


Figure 12.7d

**Figure 12.7 Writing Text for Slides**
Effective text slides are clear, simple guides that help the audience understand and remember the speaker's message. Notice the progression toward simplicity in these slides: Figure 12.7a is a paragraph that would distract the audience for an extended period of time. Figure 12.7b offers concise, readable bullets, although too many slides in a row in this structured design would become tedious. Figure 12.7c distills the message down to a single thought that is complete on its own but doesn't convey all the information from the original and would need embellishment from the speaker. Figure 12.7d pushes this to the extreme, with only the core piece of the message to serve as an "exclamation point" for the spoken message. Figure 12.7c, and especially Figure 12.7d, could be even more powerful with a well-chosen visual that illustrates the idea of following the flow.

TABLE 12.2 **Color and Emotion**

| Color | Emotional Associations (for U.S. audiences) | Best Uses |
|---|---|---|
| Blue | Peaceful, soothing, tranquil, cool, trusting | Background for electronic business presentations (usually dark blue); safe and conservative |
| White | Neutral, innocent, pure, wise | Font color of choice for most electronic business presentations with a dark background |
| Yellow | Warm, bright, cheerful, enthusiastic | Text bullets and subheadings with a dark background |
| Red | Passionate, dangerous, active, painful | For promoting action or stimulating the audience; seldom used as a background ("in the red" specifically refers to financial losses) |
| Green | Assertive, prosperous, envious, relaxed | Highlight and accent color (green symbolizes money in the United States but not in other countries). |

*Source:* Claudyne Wilder and David Fine, *Point, Click & Wow* (San Francisco: Jossey-Bass Pfeiffer, 1996), 63, 527.

## Selecting Design Elements

As you create slides, pay close attention to the interaction of color, background and foreground designs, artwork, typefaces, and type styles.

Color is more than just decoration; colors have meanings themselves, based on both cultural experience and the relationships that you established between the colors in your designs.

Make sure the background of your slides stays in the background; it should never get in the way of the informational elements in the foreground.

- **Color.** Color is a critical design element that can grab attention, emphasize important ideas, create contrast, influence acceptance of your ideas, improve retention, and stimulate a variety of emotions (see Table 12.2).[18] Color is powerful, so use it carefully.
- **Background designs and artwork.** All visuals have two layers of design: the *background* and the *foreground*. The background is the equivalent of paper in a printed document, and the elements in the foreground are the essential content of your slides. Make sure the background stays in the background and doesn't distract viewers or compete with the foreground. (Note that many of the template designs in presentation software have backgrounds that are too distracting for serious business use.)
- **Foreground designs and artwork.** The foreground contains the unique text and graphic elements that make up each individual slide. Foreground elements can be either functional or decorative. *Functional artwork* includes photos, technical drawings, charts, and other visual elements containing information that's part of your message. In contrast, *decorative artwork* simply enhances the look of your slides and should be using sparingly, if at all.
- **Typefaces and type styles.** Type is harder to read on-screen than on the printed page, so you need to choose fonts and type styles with care. Sans serif fonts are usually easier to read than serif fonts. Use both uppercase and lowercase letters, with generous space between lines of text, and limit the number of fonts to one or two per slide. Choose font sizes that are easy to read from anywhere in the room, usually between 28 and 36 points, and test them in the room if possible. A clever way to test readability at your computer is to stand back as many feet from the screen as your screen size in inches (17 feet for a 17-inch screen, for example). If the slides are readable at this distance, you're probably in good shape.[19]

Many of the typefaces available on your computer are difficult to read on screen, so they aren't good choices for presentation slides.

Design inconsistencies confuse and annoy audiences; don't change colors and other design elements randomly throughout your presentation.

Maintaining design consistency is critical because audiences start to assign meaning to visual elements beginning with the first slide. For instance, if yellow is used to call attention to the first major point in your presentation, viewers will expect the next occurrence of yellow to also signal an important point. The *slide master* feature makes consistency easy to achieve because it applies consistent design choices to every slide in a presentation.

## Adding Animation and Multimedia

You can animate just about everything in an electronic presentation, but resist the temptation to do so; make sure an animation has a purpose.

Today's presentation software offers many options for livening up your slides, including sound, animation, video clips, transition effects, hyperlinks, and zooming. Think about the impact that all these effects will have on your audience, and use only those special effects that support your message.[20]

*Functional animation* involves motion that is directly related to your message, such as a highlight arrow that moves around the screen to emphasize specific points in a technical diagram. Such animation is also a great way to demonstrate sequences and procedures. In contrast, *decorative animation*, such as having a block of text cartwheel in from offscreen or using the zooming and panning capabilities in Prezi in ways that don't enhance audience understanding, needs to be incorporated with great care. These effects don't add any functional value, and they easily distract audiences.

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**Slide transitions** control how one slide replaces another, such as having the current slide gently fade out before the next slide fades in. Subtle transitions like this can ease your viewers' gaze from one slide to the next, but many of the transition effects now available are little more than distractions and are best avoided. **Slide builds** control the release of text, graphics, and other elements on individual slides. With builds, you can make key points appear one at a time rather than having all of them appear on a slide at once, thereby making it easier for you and the audience to focus on each new message point.

If you use transitions between slides, make sure they are subtle; they should do nothing more than ease the eye from one slide to the next.

A *hyperlink* instructs your computer to jump to another slide in your presentation, to a website, or to another program entirely. Using hyperlinks is also a great way to build in flexibility so that you can instantly change the flow of your presentation in response to audience feedback.

Hyperlinks let you build flexibility into your presentations.

Multimedia elements offer the ultimate in active presentations. Using audio and video clips can be a great way to complement your textual message. Just be sure to keep these elements brief and relevant, as supporting points for your presentation, not as replacements for it.

### INTEGRATING MOBILE DEVICES IN PRESENTATIONS

Smartphones and tablets offer a variety of ways to enhance presentations for presenters as well as audience members. For example, you can get around the problem of everyone in the audience having a clear view of the screen with systems that broadcast your slides to tablets and smartphones. In fact, these systems can eliminate a conventional projection system entirely; everyone in the audience can view your slides on their mobile devices. You can also broadcast a live presentation to mobile users anywhere in the world. Each time you advance to a new slide, it is sent to the phone or tablet of everyone who is subscribed to your presentation.[21]

**MOBILE APPS**
SlideShark lets you present and share PowerPoint slides with mobile and PC users.

## Completing a Presentation

**4 LEARNING OBJECTIVE**
Outline three special tasks involved in completing a presentation.

The completion step for presentations involves a wider range of tasks than most printed documents require. Make sure you allow enough to time to test your presentation slides, verify equipment operation, practice your speech, and create handout materials. With a first draft of your presentation in hand, revise your slides to make sure they are readable, concise, consistent, and fully operational (including transitions, builds, animation, and multimedia). Complete your production efforts by finalizing your slides, creating handouts, choosing your presentation method, and practicing your delivery.

### FINALIZING YOUR SLIDES

Electronic presentation software can help you throughout the editing and revision process. For example, the *slide sorter* view (different programs have different names for this feature) lets you see some or all of the slides in your presentation on a single screen. Use this view to add and delete slides, reposition slides, check slides for design consistency, and verify the operation of any effects. Moreover, the slide sorter is a great way to review the flow of your story.[22]

In addition to using content slides, you can help your audience follow the flow of your presentation by creating slides for your title, agenda and program details, and navigation:

- **Title slide(s).** You can make a good first impression with one or two title slides, the equivalent of a report's cover and title page.

- **Agenda and program details.** These slides communicate the agenda for your presentation and any additional information the audience might need, such as hashtags and WiFi log-in information.
- **Navigation slides.** To tell your audience where you're going and where you've been, you can use a series of **navigation slides**. A simple way to do this is to repeat your agenda slide at the beginning of each major section in your presentation, with the upcoming section highlighted in some way. (The two navigation slides in Figure 12.8 show a more stylized way of showing the audience where you are in the presentation.)

Navigation slides help your audience keep track of what you've covered already and what you plan to cover next.

Figure 12.8 illustrates some of the many options you have for presenting various types of information. Note that although these slides don't follow a rigid structure of text-heavy bullet points, they are unified by the color scheme (silver background and bold color accents) and typeface selections.

## CREATING EFFECTIVE HANDOUTS

Use handout materials to support the points made in your presentation and to offer the audience additional information on your topic.

*Handouts*—any printed materials you give the audience to supplement your talk—should be considered an integral part of your presentation strategy. Handouts can include detailed charts and tables, case studies, research results, magazine articles, and anything else that supports the main idea of your presentation.

Plan your handouts as you develop your presentation so that you use each medium as effectively as possible. Your presentation should paint the big picture, convey and connect major ideas, set the emotional tone, and rouse the audience to action (if that is relevant to your talk). Your handouts can then carry the rest of the information load, providing the supporting details that audience members can consume at their own speed, on their own time. You won't need to worry about stuffing every detail into your slides, because you have the more appropriate medium of printed documents to do that. As Garr Reynolds puts it, "Handouts can set you free."[23]

For the latest information on tools and techniques for presentation slides, visit **http://real-timeupdates.com/bce7** and click on Chapter 12.

## CHOOSING YOUR PRESENTATION METHOD

In nearly all instances, speaking from notes (rather than a full script) is the most effective delivery mode.

With all your materials ready, your next step is to decide which method of speaking you want to use. Speaking from notes (rather than from a fully written script) is nearly always the most effective and easiest delivery mode. This approach gives you something to refer to as you progress while still allowing for plenty of eye contact, a natural speaking flow, interaction with the audience, and improvisation in response to audience feedback.

In contrast, reciting your speech from memory is nearly always a bad idea. Even if you can memorize the entire presentation, you will sound stiff and overly formal because you are "delivering lines," rather than talking to your audience. However, memorizing a quotation, an opening statement, or a few concluding remarks can bolster your confidence and strengthen your delivery.

Reading a speech is necessary in rare instances, such as when delivering legal information, policy statements, or other messages that must be conveyed in an exact manner. However, for all other business presentations, reading is a poor choice because it limits your interaction with the audience and lacks the fresh, dynamic feel of natural talking.

Another important decision at this point is preparing the venue where you will speak. In many instances, you won't have much of a choice, and in some situations, you won't even be able to visit the venue ahead of time. However, if you do have some control over the environment, think carefully about the seating for the audience, your position in the room, and the lighting. For instance, dimming the lights is common practice for many presenters, but dimming them too far can hamper the nonverbal communication between you and your audience and therefore limit opportunities for interaction.[24]

## PRACTICING YOUR DELIVERY

The more you practice, the more confidence you'll have in yourself and your material.

Practicing your presentation is essential. Practice boosts your confidence, gives you a more professional demeanor, and lets you verify the operation of your visuals and equipment.

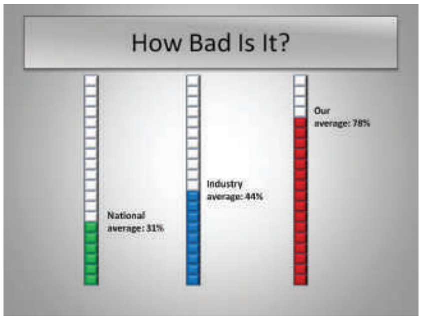
*Left*: This introductory slide is a blunt attention-getter, something that would have to be used with caution and only in special circumstances.

*Right*: This simple math equation gets the point across about how expensive high employee turnover is.



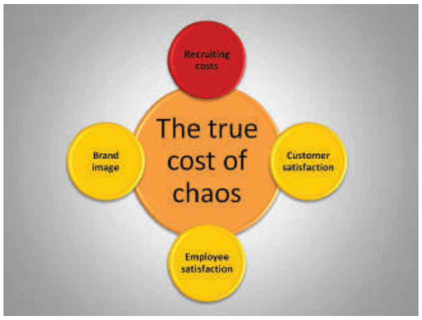
*Left*: This stylized bar graph sends a stark visual message about how bad the company's turnover really is.

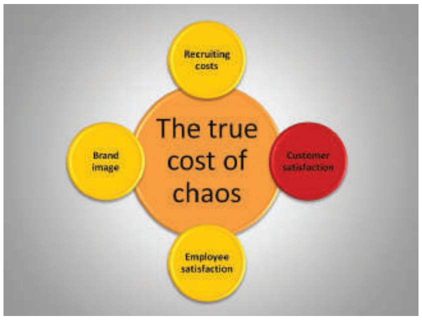
*Right*: This slide is essentially a bullet list, with three groups of two bullets each. Repeating the photo element from the introductory slide emphasizes the message about employee turnover.





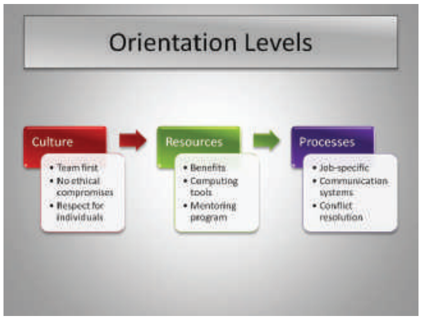
These two *navigation slides* show one way to introduce each of the four subtopics in this particular section. As the highlight moves around the central circle, the audience is reminded of which subtopics have been covered and which subtopic is going to be covered next. And each time it is shown, the message is repeated that all these problems are the "true cost of chaos" in the company's employment practices.



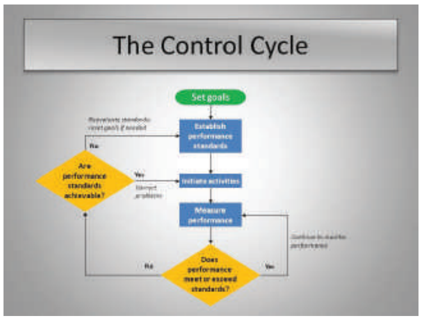

*Left*: This slide introduces three key points the speaker wants to emphasize in this particular section.

*Right*: This slide shows a linear flow of ideas, each with bulleted subpoints. This slide could be revealed one section at a time to help the speaker keep the audience's attention focused on a single topic.


*Left*: This flowchart packs a lot of information onto one slide, but seeing the sequence of events in one place is essential.

*Right*: This simple visual highlights the presenter's spoken message about being careful to choose the right tasks to focus on and them completing them quickly.



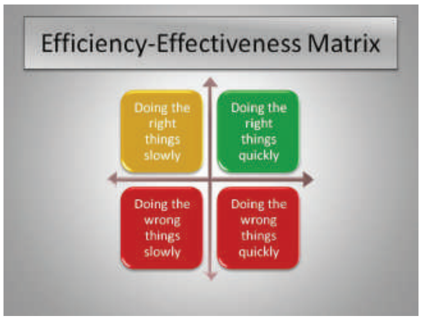




**Figure 12.8 Designing Effective Visuals: Selected Slides**

These slides, from a presentation that addresses a company's high employee turnover rate, illustrate the wide variety of design options for creating effective, appealing slides. (All the slides were created using features in PowerPoint.)

A test audience can tell you if your slides are understandable and whether your delivery is effective. A day or two before you're ready to step on stage for an important talk, make sure you and your presentation are ready:

- Can you present your material naturally, without reading your slides?
- Could you still make a compelling and complete presentation if you experience an equipment failure and have to proceed without using your slides at all?
- Is the equipment working, and do you know how to work it?
- Is your timing on track?
- Can you easily pronounce all the words you plan to use?
- Have you anticipated likely questions and objections?

Make sure you're comfortable with the equipment you'll be expected to use; you don't want to be fumbling with controls while the audience is watching and waiting.

If you're addressing an audience that doesn't speak your language, consider using an interpreter. Send your interpreter a copy of your speech and visuals as far in advance of your presentation as possible. If your audience is likely to include persons with hearing impairments, be sure to team up with a sign-language interpreter as well.

When you deliver a presentation to people from other cultures, you may need to adapt the content of your presentation. It is also important to take into account any cultural differences in appearance, mannerisms, and other customs. Your interpreter or host will be able to suggest appropriate changes for a specific audience or occasion.

# Delivering a Presentation

5 LEARNING OBJECTIVE
Describe four important aspects of delivering a presentation in today's social media environment.

It's show time. This section offers practical advice on four important aspects of delivery: overcoming anxiety, handling questions responsively, embracing the backchannel, and giving presentations online.

## OVERCOMING ANXIETY

Preparation is the best antidote for anxiety; it gives you confidence that you know your material and that you can recover from any glitches you might encounter.

Even seasoned pros get a little nervous before a big presentation—and that is a good thing. Nervousness is an indication that you care about your audience, your topic, and the occasion. These techniques will help you convert anxiety into positive energy:[25]

- **Stop worrying about being perfect.** Successful speakers focus on making an authentic connection with their listeners, rather than on trying to deliver a note-perfect presentation.
- **Know your subject.** The more familiar you are with your material, the less panic you'll feel.
- **Practice, practice, practice.** The more you rehearse, the more confident you will feel.
- **Visualize success.** Visualize mental images of yourself in front of the audience, feeling confident, prepared, and able to handle any situation that might arise.[26] Remember that your audience wants you to succeed, too.
- **Remember to breathe.** Tension can lead people to breathe in a rapid and shallow fashion, which can create a lightheaded feeling. Breathe slowly and deeply to maintain a sense of calm and confidence.
- **Be ready with your opening line.** Have your first sentence memorized so you don't have to improvise your opening.
- **Be comfortable.** Dress appropriately but as comfortably as possible. Drink plenty of water ahead of time to hydrate your voice (bring a bottle of water with you, too).
- **Take a three-second break if you need to.** If you sense that you're starting to race, pause and arrange your notes or perform some other small task while taking several deep breaths. Then start again at your normal pace.
- **Concentrate on your message and your audience, not on yourself.** When you're busy thinking about your subject and observing your audience's response, you tend to forget your fears.

REAL-TIME UPDATES
LEARN MORE BY READING THIS ARTICLE
**Two secrets to presenting like a pro**
Read how to build your confidence and stay in the moment. Go to **http://real-timeupdates.com/bce7**. Under "Students," click on "Learn More."

- **Maintain eye contact with friendly audience members.** Eye contact not only makes you appear sincere, confident, and trustworthy but can give you positive feedback as well.
- **Keep going.** Things usually get better as you move along, with each successful minute giving you more and more confidence.

## HANDLING QUESTIONS RESPONSIVELY

Don't leave the question-and-answer period to chance: Anticipate potential questions and think through your answers.

Whether you take them during a formal question-and-answer (Q&A) period or as they come up during your presentation, questions are often one of the most important parts of a presentation. They give you a chance to obtain important information, to emphasize your main idea and supporting points, and to build enthusiasm for your point of view. When you're speaking to high-ranking executives in your company, the Q&A period will often consume most of the time allotted for your presentation.[27]

Whether or not you can establish ground rules for questions depends on the audience and the situation. If you're presenting to a small group of upper managers or potential investors, for example, you will probably have no say in the matter: Audience members will likely ask as many questions as they want, whenever they want, to get the information they need. On the other hand, if you are presenting to your peers or a large public audience, establish some guidelines, such as the number of questions allowed per person and the overall time limit for questions.

Don't assume you can handle whatever comes up without some preparation.[28] Learn enough about your audience members to get an idea of their concerns, and think through answers to potential questions.

When people ask questions, pay attention to nonverbal signals to help determine what each person really means. Repeat the question to confirm your understanding and to ensure that the entire audience has heard it. If the question is vague or confusing, ask for clarification; then give a simple, direct answer.

If you don't have the complete answer to an important question, offer to provide it after the presentation.

If you are asked a difficult or complex question, avoid the temptation to sidestep it. Offer to meet with the questioner afterward if the issue isn't relevant to the rest of the audience or if giving an adequate answer would take too long. If you don't know the answer, don't pretend you do. Instead, offer to get a complete answer as soon as possible.

Be on guard for audience members who use questions to make impromptu speeches or to take control of your presentation. Without offending anyone, find a way to stay in control. You might admit that you and the questioner have differing opinions and offer to get back to the questioner after you've done more research.[29]

If you ever face hostile questions, respond honestly and directly while keeping your cool.

If a question ever puts you on the hot seat, respond honestly but keep your cool. Look the person in the eye, answer the question as well as you can, and keep your emotions under control. Defuse hostility by paraphrasing the question and asking the questioner to confirm that you've understood it correctly. Maintain a businesslike tone of voice and a pleasant expression.[30]

## EMBRACING THE BACKCHANNEL

Twitter and other social media are changing business presentations by making it easy for all audience members to participate in the *backchannel.*

Many business presentations these days involve more than just the conversation between the speaker and his or her audience. Using Twitter and other electronic media, audience members often carry on their own parallel communication during a presentation via the **backchannel**, which presentation expert Cliff Atkinson defines as "a line of communication created by people in an audience to connect with others inside or outside the room, with or without the knowledge of the speaker."[31] Chances are you've participated in a backchannel already, such as when texting with your classmates or live-blogging during a lecture.

The backchannel presents both risks and rewards for business presenters. On the negative side, for example, listeners can research your claims the instant you make them and spread the word quickly if they think your information is shaky. The backchannel also gives contrary audience members more leverage, which can lead to presentations spinning out of control. On the plus side, listeners who are excited about your message can build support for it, expand on it, and spread it to a much larger audience in a matter of seconds. You can also get valuable feedback during and after presentations.[32]

Resist the urge to ignore or fight the backchannel; instead, learn how to use it to your advantage.

By embracing the backchannel, rather than trying to fight it or ignore it, presenters can use this powerful force to their advantage. Follow these tips to make the backchannel work for you:[33]

- **Integrate social media into the presentation process.** For example, you can create a website for the presentation so that people can access relevant resources during or after the presentation, create a Twitter hashtag that everyone can use when sending tweets, or display the Twitterstream during Q&A so that everyone can see the questions and comments on the backchannel.
- **Monitor and ask for feedback.** Using a free service such as TweetDeck, which organizes tweets by hashtag and other variables, you can monitor comments from people in the audience. To avoid trying to monitor the backchannel while speaking, you can schedule "Twitter breaks," during which you review comments and respond as needed.
- **Review comments point by point to improve your presentation.** After a presentation is over, review comments on audience members' Twitter accounts and blogs to see which parts confused them, which parts excited them, and which parts seemed to have little effect (based on few or no comments).
- **Automatically tweet key points from your presentation while you speak.** Add-ons for presentation software can send out prewritten tweets as you show specific slides during a presentation. By making your key points readily available, you make it easy for listeners to retweet and comment on your presentation.
- **Establish expectations with the audience.** Explain that you welcome audience participation, but to ensure a positive experience for everyone, comments should be civil, relevant, and productive.

## GIVING PRESENTATIONS ONLINE

Online presentations give you a way to reach more people in less time, but they require special preparation and skills.

Online presentations offer many benefits, including the opportunity to communicate with a geographically dispersed audience at a fraction of the cost of travel and the ability for a project team or an entire organization to meet at a moment's notice. However, this format also presents some challenges for the presenter, thanks to that layer of technology between you and your audience. Many of those "human moments" that guide and encourage you through an in-person presentation won't travel across the digital divide. For instance, it's often difficult to tell whether audience members are bored or confused, because your view of them is usually confined to small video images (and sometimes not even that).

To ensure successful online presentations, keep the following advice in mind:

- **Consider sending preview study materials ahead of time.** Doing so allows audience members to familiarize themselves with any important background information. Also, by using a free service such as SlideShare, you can distribute your presentation slides to either public or private audiences, and you can record audio narrative to make your presentations function on their own.[34] Some presenters advise against giving out your slides ahead of time, however, because doing so gives away the ending of your presentation, so to speak.
- **Keep your presentation as simple as possible.** Break complicated slides down into multiple slides if necessary, and keep the direction of your discussion clear so that no one gets lost.
- **Ask for feedback frequently.** You won't have as much of the visual feedback that alerts you when audience members are confused, and many online viewers will be reluctant to call attention to themselves by interrupting you to ask for clarification. Setting up a backchannel via Twitter or as part of your online meeting system will help in this regard.
- **Consider the viewing experience from the audience members' point of view.** Will they be able to see what you think they can see? For instance, webcast video is typically displayed in a small window on-screen, so viewers may miss important details.
- **Allow plenty of time for everyone to get connected and familiar with the screen they're viewing.** Build extra time into your schedule to ensure that everyone is connected and ready to start.

Last but not least, don't get lost in the technology. Use these tools whenever they'll help, but remember that the most important aspect of any presentation is getting the audience to receive, understand, and embrace your message.

For the latest information on online presentations, visit **http://real-timeupdates.com/bce7** and click on Chapter 12.

# Chapter Review and Activities

## Learning Objectives: Check Your Progress

**Objective 1: Highlight the importance of presentations in your business career, and explain how to adapt the planning step of the three-step process to presentations.**

Presentations give the opportunity to use all your communication skills, from research to writing to speaking. They also demonstrate your ability to think quickly, to adapt to challenging situations, and to handle touchy questions and complex issues.

The tasks in planning presentations are generally the same as with any other business message, but three tasks require special consideration. First, when analyzing the situation, in addition to understanding the audience's information needs, you also need to anticipate the likely emotional states of your listeners during the presentation. Second, although some presentations consist only of the purely oral medium of spoken communication, presentations increasingly involve integration with a variety of electronic media. Third, to organize your presentation, you need to decide whether to create a conventional linear presentation (using PowerPoint or similar software) or a nonlinear presentation (using Prezi or a similar system). With any format, limiting the scope is particularly vital, because many presentations must fit strict time limits, and keeping presentations as short as possible is always a good idea in order to avoid losing the audience's attention.

**Objective 2: Describe the tasks involved in developing a presentation.**

Although you usually don't write out a presentation word for word, you still engage in the writing process—developing your ideas, structuring support points, phrasing your transitions, and so on. Adapting to the audience is crucial because presentation audiences and venues can vary widely, from small, informal gatherings to formal keynote speeches in large auditoriums to virtual presentations given entirely online. To compose a presentation, break it down into three essential parts: an introduction that arouses the audience's interest in your topic, establishes your credibility, and prepares the audience for what will follow; a body that conveys your information in a way that maintains audience interest and makes it easy to connect one idea to the next; and a close that restates your main points, wraps up any unfinished business, and lets you end with clarity and confidence.

**Objective 3: Describe the six major design and writing tasks required to enhance your presentation with effective visuals.**

First, choose between structured and free-form slides. Structured slides follow the same design plan for most or all the slides in a presentation, are often created by using the templates provided with presentation software, and tend to convey most of their information through bullet points. In contrast, visually oriented free-form slides do not follow any set design scheme from slide to slide, although they should have a unified sense of color, font selection, and other design elements. Second, look for opportunities to design slides around a key visual that unites and explains important points. Third, for any slides that have textual content, be sure to strictly limit the word count and keep the font size large enough to read easily. Fourth, make sure any graphic elements are simple and clear enough to be easily grasped from anywhere in the room. Fifth, choose and use design elements—color, background and foreground designs, artwork, typefaces, and type styles—in a way that enhances, not obscures, your message. Sixth, add animation and multimedia elements if they will help build audience interest and understanding.

**Objective 4: Outline three special tasks involved in completing a presentation.**

The completion stage for presentations involves a wider range of tasks than printed documents require. Three tasks demand particular attention. First, finalize your slides and support materials using the slide sorter to get a big-picture view of your presentation and create title slide(s), agenda and program detail slides, and navigation slides. Second, choose your presentation method: memorizing your material word for word, reading a printout of your material, or speaking from notes. Speaking from notes is the best choice for most presentations. Third, practice your delivery. Practice helps ensure a smooth presentation and boosts your confidence.

**Objective 5: Describe four important aspects of delivering a presentation in today's social media environment.**

First, take steps to reduce your anxiety, which include not trying to be perfect, preparing more material than is necessary, practicing extensively, visualizing success, breathing deeply and slowly, being ready with an opening line, dressing as comfortably as appropriate, taking a deliberate pause if you're rushing, concentrating on your message, maintaining eye contact, and plowing ahead no matter what happens.

Second, handle questions responsively. First, determine whether you can set boundaries for the Q&A period. Prepare answers to potential questions. Pay attention to nonverbal signals and be sure to respond to all questions. Don't let questioners take control of the presentation. Face hostile questions head-on without getting defensive. Finally, alert the audience when the Q&A period is almost over.

Third, embrace the backchannel, the parallel conversation that might be going on among audience members on Twitter and other media. To take advantage of the backchannel, you can integrate social media into your presentation, monitor and ask for feedback, review comments point by point to improve your presentation, automatically tweet key points from your presentation while you speak, and establish expectations with the audience.

Fourth, to ensure a successful online presentation, consider sending preview materials ahead of time, keep your content and presentation as simple as possible, ask for feedback frequently, consider the viewing experience from the audience's side, and give participants time to get connected.

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## Test Your Knowledge

To review chapter content related to each question, refer to the indicated Learning Objective.

✪ **12-1.** What skills do presentations give you the opportunity to practice and demonstrate? [LO-1]

✪ **12-2.** How do linear and nonlinear presentations differ? [LO-1]

**12-3.** What three goals should you accomplish during the introduction of a presentation? [LO-2]

**12-4.** What techniques can you use to get an audience's attention during your introduction? [LO-2]

**12-5.** What are the advantages and disadvantages of both structured and free-form slides? [LO-3]

**12-6.** Explain the four aspects one must consider in order to deliver an effective presentation. [LO-5]

## Apply Your Knowledge

To review chapter content related to each question, refer to the indicated Learning Objective.

✪ **12-7.** Assume you are a news anchor for a television channel presenting election results from different states as well as tweets from your viewers. Would a linear or a nonlinear presentation be more appropriate? Why? Are you familiar with any software that might be especially suited to your presentation style? How would you integrate the tweets into your presentation? [LO-1]

✪ **12-8.** Is it ethical to use design elements and special effects to persuade an audience? Why or why not? [LO-3]

**12-9.** How can navigation slides help guide your audience through a presentation? [LO-4]

## Practice Your Skills

### Activities

Each activity is labeled according to the primary skill or skills you will need to use. To review relevant chapter content, you can refer to the indicated Learning Objective. In some instances, supporting information will be found in another chapter, as indicated.

**12-10. Presentations: Planning a Presentation [LO-1]** Select one of the following topics:

**a.** Business communications: the need of the hour
**b.** Presentation skills: Basic dos and don'ts
**c.** My communication strengths and weaknesses
**d.** I am afraid of ________.
**e.** It's easy for me to ________.
**f.** I get angry when ________.
**g.** I am happiest when I ________.
**h.** People would be surprised if they knew that I ________.
**i.** My favorite older person
**j.** My favorite charity
**k.** My favorite place
**l.** My favorite sport
**m.** My favorite store
**n.** My favorite television show
**o.** The town you live in suffers from a great deal of juvenile vandalism. Explain to a group of community members why juvenile recreational facilities should be built instead of a juvenile detention complex.
**p.** You are speaking to the Humane Society. Support or oppose the use of animals for medical research purposes.
**q.** You are talking to civic leaders of your community. Try to convince them to build an art gallery.
**r.** You are speaking to students of an elementary school on waste recycling. Explain the segregation of dry and wet waste.
**s.** You are speaking to a group of traveling salespeople. Convince them that they should wear seat belts while driving.
**t.** You are speaking to a group of elderly people. Convince them to adopt an exercise program.
**u.** Energy issues (supply, conservation, alternative sources, national security, global warming, pollution, etc.)
**v.** Financial issues (banking, investing, family finances, etc.)
**w.** Government (domestic policy, foreign policy, Social Security taxes, welfare, etc.)
**x.** Interesting new technologies (virtual reality, geographic information systems, nanotechnology, bioengineering, etc.)
**y.** Politics (political parties, elections, legislative bodies and legislation, the presidency, etc.)
**z.** Sports (amateur and professional, baseball, football, golf, hang gliding, hockey, rock climbing, tennis, etc.)

Research your topic as needed and prepare a brief presentation (5–10 minutes) to be given to your class.

**12-11. Presentations: Developing a Presentation; Collaboration: Team Projects [LO-2], Chapter 2** You've been asked to give an informative 10-minute talk on vacation opportunities in your home state. Draft your introduction, which should last no more than 2 minutes. Then pair up with a classmate and analyze each other's introductions.

How well do these two introductions arouse the audience's interest, build credibility, and preview the presentation? Suggest how these introductions might be improved.

**12-12. Presentations: Developing a Presentation [LO-2]** Locate the transcript of a speech, either online or through your school library. Good sources include Yahoo's directory of commencement speeches and the publication *Vital Speeches of the Day*. (Recent years of *Vital Speeches of the Day* are available in the ProQuest database; ask at your library.) Many corporate websites also have archives of executives' speeches; look in the "investor relations" section. Examine both the introduction and the close of the speech you've chosen and then analyze how these two sections work together to emphasize the main idea. What action does the speaker want the audience to take? Next, identify the transitional sentences or phrases that clarify the speech's structure for the listener, especially those that help the speaker shift between supporting points. Using these transitions as clues, list the main message and supporting points; then indicate how each transitional phrase links the current supporting point to the succeeding one. Prepare a two- to three-minute presentation summarizing your analysis for your class.

**12-13. Presentations: Designing Presentation Visuals [LO-3]** Imagine you are called to deliver a presentation on oral hygiene to students in the age group of five to eight years old. Gather information from various print and online sources to support your messages. Prepare a presentation, of just 10 slides, visually depicting the importance of oral hygiene to these young children.

**12-14. Completing Presentations [LO-4]** You are requested to present a progress report on the new sports facility in your institute. Prepare 15 slides depicting activities undertaken, timelines adhered to, and costs involved. Considering you have just 10 minutes to deliver the report, how would you ensure that your presentation has an impact?

**12-15. Presentations: Mastering Delivery; Nonverbal Communication: Analyzing Nonverbal Signals [LO-5], Chapter 2** Observe and analyze the delivery of a speaker in a school, work, or other setting. What type of delivery did the speaker use? Was this delivery appropriate for the occasion? What nonverbal signals did the speaker use to emphasize key points? Were these signals effective? Which nonverbal signals would you suggest to further enhance the delivery of this oral presentation? Why?

**12-16. Presentations: Delivering a Presentation; Collaboration: Team Projects; Media Skills: Microblogging [LO-5], Chapter 2, Chapter 6** In a team of six students, develop a 10-minute Prezi or slide presentation on any topic that interests you. Nominate one person to give the presentation; the other five will participate via a Twitter backchannel. Create a webpage that holds at least one downloadable file that will be discussed during the presentation. Practice using the backchannel, including using a hashtag for the meeting and having the presenter ask for audience feedback during a "Twitter break." Be ready to discuss your experience with the entire class.

## Expand Your Skills

### Critique the Professionals

Visit the TED website and listen to any presentation that interests you. Compare the speaker's delivery and visual support materials with the concepts presented in this chapter. What works? What doesn't work? Using whatever medium your instructor requests, write a brief summary of your analysis.

### Sharpen Your Career Skills Online

Bovée and Thill's Business Communication Web Search, at **http://websearch.businesscommunicationnetwork.com**, is a unique research tool designed specifically for business communication research. Use the Web Search function to find a website, video, PDF document, podcast, or presentation that offers advice on creating and delivering business presentations. Write a brief email message to your instructor or a post for your class blog, describing the item that you found and summarizing the career skills information you learned from it.

# Cases

Website links for selected companies mentioned in cases can be found in the Student Assignments section at **http://real-timeupdates.com/bce7**.

### PRESENTATION SKILLS/PORTFOLIO BUILDER

**12-17. Presentations: Planning a Presentation [LO-1]** Pecha-kucha is a style of presentation that might be the ultimate in creative constraint: The speaker is limited to 20 slides, each of which is displayed for exactly 20 seconds before automatically advancing. Pecha-kucha Nights, which are open to the public, are now put on in cities all over the world. Visit the PechaKucha 20x20 website for more information on these events or to view some archived presentations.

**Your task:** Select one of the subjects from 12–10 and develop a *pecha-kucha* style presentation with 20 slides, each designed to be displayed for 20 seconds. Use the slide-timing capabilities in your presentation software to control the timing. Make sure you practice before presenting to your class so that you can hit the precise timing requirements.[35]

## PRESENTATION SKILLS/ SOCIAL NETWORKING SKILLS

**12-18. Presentations: Planning a Presentation [LO-1]** You know those times when you're craving Thai food or the perfect fruit smoothie, but you don't know where to go? Or when you're out shopping or clubbing and want to let your friends know where you are? Foursquare's location-based services connect you with friends and companies that offer products and services of interest.

**Your task:** Create a brief presentation explaining the Foursquare concept and its features and benefits. List two Foursquare competitors and give a brief assessment of which of the three you would recommend to your classmates.

## PRESENTATION SKILLS

**12-19. Planning, Designing, and Creating Presentation Slides [LO-1], [LO-2], [LO-3], [LO-4]** Not long ago, snowboarding seemed to be on pace to pass skiing as the country's favorite way to zoom down snowy mountains, but the sport's growth has cooled off in recent years.[36]

**Your task:** Research and prepare a 10-minute presentation on participation trends in snowboarding and skiing, including explanations for the relative popularity of both sports. Include at least three quotations to emphasize key points in your presentation. Use either structured or free-form slides.

## PRESENTATION SKILLS

**12-20. Planning, Designing, and Creating Presentation Slides [LO-1], [LO-2], [LO-3], [LO-4]** Many companies publish stories of their founding and early years. The computer company Hewlett-Packard (HP), for example, tells the story of how founders Bill Hewlett and Dave Packard started the company in a garage in Palo Alto, California, in 1938, doing anything they could to "bring in a nickel." That garage is now preserved as "the birthplace of Silicon Valley," which helps maintain HP's image as a technology pioneer.[37]

**Your task:** Choose a company that has been in business for at least two decades and prepare a 10-minute presentation on its history.

## PRESENTATION SKILLS/TEAM SKILLS

**12-21. Presentations: Planning a Presentation [LO-1]** In your job as a business development researcher for a major corporation, you're asked to gather and process information on a wide variety of subjects. Management has gained confidence in your research and analysis skills and would now like you to begin making regular presentations at management retreats and other functions. Topics are likely to include the following:

- Offshoring of U.S. jobs
- Foreign ownership of U.S. firms
- Employment issues involving workers from other countries
- Tax breaks offered by local and state governments to attract new businesses
- Economic impact of environmental regulations

**Your task:** With a team assigned by your instructor, choose one of the topics from the list and conduct enough research to familiarize yourself with the topic. Identify at least three important issues that anyone involved with this topic should know about. Prepare a 10-minute presentation that introduces the topic, comments on its importance to the U.S. economy, and discusses the issues you've identified. Assume that your audience is a cross-section of business managers who don't have any particular experience in the topic you've chosen.

## PRESENTATION SKILLS/PORTFOLIO BUILDER

**12-22. Presentations: Designing Presentation Visuals [LO-4]** Depending on the sequence your instructor chose for this course, you've probably covered 8 to 10 chapters at this point and learned or improved many valuable skills. Think through your progress and identify five business communication skills that you've either learned for the first time or developed during this course.

**Your task:** Create a Prezi or slide presentation that describes each of the five skills you've identified. Be sure to explain how each skill could help you in your career. Use any visual style that you feel is appropriate for the assignment.

## PRESENTATION SKILLS/MOBILE SKILLS

**12-23. Presentations: Designing Presentation Visuals; Mobile Media [LO-4]** On SlideShare or any other source, find a business presentation on any topic that interests you.

**Your task:** Re-create the first five slides in the presentation in a manner that will make them more mobile-friendly. Create as many additional slides as you need.

## PRESENTATION SKILLS/TEAM SKILLS

**12-24. Planning, Designing, and Creating Presentation Slides; Collaboration: Team Projects [LO-1], [LO-2], [LO-3], [LO-4], Chapter 2** Changing a nation's eating habits is a Herculean task, but the physical and financial health of the United States depends on it. You work for the USDA Center for Nutrition Policy and Promotion, and it's your job to educate people on the dangers of unhealthy eating and the changes they can make to eat more balanced and healthful diets.

**Your task:** Visit http://real-timeupdates.com/bce7, click on Student Assignments, and download Chapter 12 Case (*Dietary Guidelines for Americans*). With a team assigned by your instructor, develop a 10- to 15-minute presentation that conveys the key points from Chapter 3 of the *Guidelines*, "Food and Food Components to Reduce." The objectives of your presentation are to alert people to the dangers of excessive consumption of the five components discussed in the chapter and to let them know what healthy levels of consumptions are. This chapter has a lot of information, but you don't need to pack it all into your presentation; you can assume that the chapter will be available as a handout to anyone who attends your presentation. Along with your presentation, draft speaking notes that someone outside your team could use to give the presentation. You can use images from the *Guidelines* PDF, the websites of the U.S. Department of Agriculture and the U.S. Department of Health and Human Services, or a nongovernment source such as Creative Commons. Cite all your image sources and make sure you follow the usage and attribution guidelines for any photos you find on nongovernment sites.

# Improve Your Grammar, Mechanics, and Usage

You can download the text of this assignment from **http://real-timeupdates.com/bce7**; click on Student Assignments and then click on Chapter 12. Improve Your Grammar, Mechanics, and Usage.

### Level 1: Self-Assessment—Capitals and Abbreviations

Review Sections 3.1 and 3.3 in the Handbook of Grammar, Mechanics, and Usage. For the following 15 items, capitalize any words that should be capitalized, spell out any abbreviations that should be spelled out, and insert abbreviations where appropriate.

**12-25.** Dr. paul hansen is joining our staff.

**12-26.** New caressa skin cream should be in a position to dominate that market.

**12-27.** Send this report to Mister h. k. danforth, rural route 1, warrensburg, new york 12885.

**12-28.** You are responsible for training my new assistant to operate the xerox machine.

**12-29.** She received her master of business administration degree from the university of michigan.

**12-30.** The building is located on the corner of madison and center streets.

**12-31.** Call me at 8 tomorrow morning, pacific standard time, and I'll have the information you need.

**12-32.** When jones becomes ceo next month, we'll need your input asap.

**12-33.** Address it to art bowers, chief of production.

**12-34.** Please rsvp to sony corp. just as soon as you know your schedule.

**12-35.** The data-processing department will begin work on feb. 2, just one wk. from today.

**12-36.** You are to meet him on friday at the un building in nyc.

**12-37.** Whenever you can come, professor, our employees will greatly enjoy your presentation.

**12-38.** At 50 per box, our std. contract forms are \$9 a box, and our warranty forms are \$7.95 a box.

**12-39.** We plan to establish a sales office on the west coast.

### Level 2: Workplace Applications

The following items may contain errors in grammar, capitalization, punctuation, abbreviation, number style, word division, and vocabulary. Rewrite each sentence, correcting all errors. If a sentence has no errors, write "Correct" for that number.

**12-40.** Mc'Donalds and Sears' have partnered with the television program, "Its Showtime At The Apollo." To offer talented kids the opportunity too appear on national television.

**12-41.** Tiffany & Co., the internationally-renowned jeweler and specialty retailer plan to open a 5000 square feet store in Walnut Creek, CA next year.

**12-42.** If none of the solutions seem satisfying, pick the more easier one.

**12-43.** Ken Baker, the west coast bureau chief for Us magazine, will be responsible for overseeing all of magazine reporting in Hollywood, conducting high profile, celebrity interviews, for identifying news stories, and assist in the generation of cover concepts.

**12-44.** With experience managing numerous enthusiast brands, including "Kawasaki" and "Skechers," Juxt Interactive are cementing their role as a leader in strategic, integrated campaigns.

**12-45.** You're message, tone, and product positioning has to be right on to be excepted and successful.

**12-46.** As I begun to put the team together, it became apparent to myself that my idea was ahead of it's time.

**12-47.** Many think that the primary market for newspapers are the readers, however advertisers generate the majority of revenues.

**12-48.** REIs outlet website features items that are not available at REI's physical stores, catalog, or main website.

**12-49.** The company's C.E.O., who we had saw at the awards dinner wednesday night, was fired the next day.

**12-50.** A designer of high priced purses such as Kate Spade or Louis Vitton generally limit distribution to exclusive boutiques or high end retail stores: such as Neiman-Marcus.

**12-51.** There is many indications that an economic recovery is underway, and will continue to stabilize and build however modestly.

**12-52.** We bought the equipment at a second hand store which turned out to be shoddy and defective.

**12-53.** Experts site 2 principle reasons for Webvan's failure; consumer resistance and over expansion.

**12-54.** Implementation of the over time hours guidelines will be carried out by the Human Resources Staff members.

### Level 3: Document Critique

The following document may contain errors in grammar, capitalization, punctuation, abbreviation, number style, word division, and vocabulary. As your instructor indicates, photocopy this page and correct all errors using standard proofreading marks (see Appendix C) or download the document and make the corrections in your word-processing software.

Dear Mr. Hansford,

There is a favorite place in which Manchester students study on our campus: the library because of the quiet atmosphere excellent resources, and helpful staff. With a ajustment in library hours there assets could be taken advantage of by more students.

In an informal survey of the students in my English class, a desire for the library to be open more hours on the weekends became evident. Many students find weekends best for researching term papers: because that's when large blocks of time can be found in their schedules.

I'd like to sight several reasons for the change I am about to propose to encourage your interest and desire for my suggestion. Understandable, librarians need a day off. Perhaps students and librarians could both be accomodated if the library closed at five p.m. on Friday night. Friday night is the time most students like to relax and attend sports events or parties. The libary could then be open on Saturdays from ten a.m. until 4:30 p.m. To make this arrangement fair to librarians; perhaps their schedules could be staggered so that nobody would have to work every Saturday or those scheduled to work on Saturdays could be given Mondays or Fridays off.

Consider implementing this new schedule this Fall. Another much-appreciated service for students will be performed if you do this.

Sincerely:
Steve Pendergrass, student

MyBCommLab

Go to **mybcommlab.com** for the following Assisted-graded writing questions:

**12-55.** How can visually oriented free-form slides help keep an audience engaged in a presentation? [LO-3]

**12-56.** How does embracing the backchannel reflect the "you" attitude? [LO-5]

## Endnotes

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**19.** Duarte, *Slide:ology: The Art and Science of Creating Great Presentations*, 152.
**20.** Lary and Pruente, "Powerless Point: Common PowerPoint Mistakes to Avoid," 28.
**21.** Greg Anderson, "Presefy Syncs and Controls Presentations over Your Phone," Arctic Startup, 14 March 2013, www.arcticstartup.com; Kanda Software website, accessed 2 May 2014, www.kandasoft.com; Heather Clancy, "Broadcast Your Mobile Presentations to Remote Attendees," ZDNet, 27 March 2013, www.zdnet.com.
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**24.** Reynolds, *Presentation Zen*, 208.
**25.** Richard Zeoli, "The Seven Things You Must Know About Public Speaking," *Forbes*, 3 June 2009, www.forbes.com; Morreale and Bovée, *Excellence in Public Speaking*, 24–25.
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# PART 5 Employment Messages and Job Interviews



Matt Carr/Getty Images

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# 13 Building Careers and Writing Résumés

## LEARNING OBJECTIVES

After studying this chapter, you will be able to

1. List eight key steps to finding the ideal opportunity in today's job market
2. Explain the process of planning your résumé, including how to choose the best résumé organization
3. Describe the tasks involved in writing your résumé, and list the sections to consider including in your résumé
4. Characterize the completing step for résumés, including the six most common formats in which you can produce a résumé



## Communication Matters . . .

"A résumé that says 'You can count on me to get things done' makes an applicant stand out."
—Joanne Pokaski, director of workforce development, Beth Israel Deaconess Medical Center[1]

In today's job market, employers are looking for candidates who can step in and start producing results quickly. By crafting a persuasive, professional résumé with clear evidence of skills and accomplishments, you take the first step in convincing recruiters you are that kind of employee.

This chapter offers some practical advice for your job search and then guides you through the three-step process for writing résumés. A résumé is one of the most important writing projects in your entire career, but this course is giving you the skills you need. This chapter will help you apply what you've learned, so you can write an effective résumé that helps you stand out from a crowded field of applicants.

Joanne Pokaski

Workforce expert Joanne Pokaski says it is vital for your résumé to send a clear message about your ability to get the job done.

# Finding the Ideal Opportunity in Today's Job Market

1 LEARNING OBJECTIVE
List eight key steps to finding the ideal opportunity in today's job market.

If you haven't already, read the Prologue, "Building a Career with Your Communication Skills," before studying this chapter.

Identifying and landing a job can be a long and challenging process. Fortunately, the skills you're developing in this course will give you a competitive advantage. This section offers a general job-search strategy with advice that applies to just about any career path you might want to pursue. As you craft your personal strategy, keep these three guidelines in mind:

- **Get organized.** Your job search could last many months and involve multiple contacts with dozens of companies. You need to keep all the details straight to ensure that you don't miss opportunities or make mistakes such as losing someone's email address or forgetting an appointment.
- **Start now and stick to it.** Even if you are a year or more away from graduation, now is not too early to get started with some of the essential research and planning tasks. If you wait until the last minute, you will miss opportunities and you won't be as prepared as other candidates.
- **Look for stepping-stone opportunities.** Particularly in today's tough job market, you might not find the opportunity you're looking for right away. You might need to take a job that doesn't meet your expectations while you keep looking to get on the right track. But view every job as an opportunity to learn workplace skills, observe effective and ineffective business practices, and fine-tune your sense of how you'd like to spend your career.

## WRITING THE STORY OF YOU

What's your story? Thinking about where you've been and where you want to go will help focus your job search.

Writing or updating your résumé is a great opportunity to step back and think about where you've been and where you'd like to go. Do you like the path you're on, or is it time for a change? Are you focused on a particular field, or do you need some time to explore?

You might find it helpful to think about the "story of you," the things you are passionate about, your skills, your ability to help an organization reach its goals, the path you've been on so far, and the path you want to follow in the future (see Figure 13.1). Think in terms of an image or a theme you'd like to project. Are you academically gifted? An effective leader? A well-rounded professional with wide-ranging talents? A creative problem solver? A technical wizard? Writing your story is a valuable planning exercise that helps you think about where you want to go and how to present yourself to target employers.

## LEARNING TO THINK LIKE AN EMPLOYER

Employers judge their recruiting success by *quality of hire*, and you can take steps to be—and look like—a high-quality hire.

When you know your side of the hiring equation a little better, switch sides and look at it from an employer's perspective. To begin with, recognize that companies take risks with every hiring decision—the risk that the person hired won't meet expectations and the risk that a better candidate has slipped through their fingers. Many companies judge the success of their recruiting efforts by *quality of hire*, a measure of how closely new employees meet the company's needs.[2] Given this perspective, what steps can you take to present yourself as the low-risk, high-reward choice?

Follow the online conversations of professional recruiters to learn what their hot-button issues are.

Of course, your perceived ability to perform the job is an essential part of your potential quality as a new hire. However, hiring managers consider more than just your ability to handle the job. They want to know if you'll be reliable and motivated—if you're somebody who "gets it" when it comes to being a professional in today's workplace. A great way to get inside the heads of corporate recruiters is to "listen in" on their professional conversations by reading periodicals such as *Workforce Management* and blogs such as Fistful of Talent and The HR Capitalist.

## RESEARCHING INDUSTRIES AND COMPANIES OF INTEREST

Learning more about professions, industries, and individual companies is a vital step in your job search. It also impresses employers, particularly when you go beyond the easily available sources such as a company's own website. "Detailed research, including talking

**My Story**

**Where I Have Been**

- Honor student and all around big shot in high school (but discovered that college is full of big shots!)
- Have worked several part-time jobs; only thing that really appealed to me in any of them was making improvements, making things work better

**Where I Am Now**

- Junior; on track to graduate in 2014
- Enjoy designing creative solutions to challenging problems
- Not a high-end techie in an engineering sense, but I figure most things out eventually
- Not afraid to work hard, whatever it takes to get the job done
- I can tolerate some routine, as long as I have the opportunity to make improvements if needed
- Tend to lead quietly by example, rather than by visibly and vocally taking charge
- Knowing that I do good work is more important than getting approval from others
- I tend not to follow fads and crowds; sometimes I'm ahead of the curve, sometimes I'm behind the curve

**Where I Want to Be**

- Get an advanced degree; not sure what subject area yet, though
- Haven't really settled on one industry or profession yet; working with systems of any kind is more appealing than any particular profession that I've learned about so far
- Develop my leadership and communication skills to become a more "obvious" leader
- Collaborate with others while still having the freedom to work independently (may be become an independent contractor or consultant at some point?)
- Have the opportunity to work internationally, at least for a few years
- I like the big bucks that corporate executives earn, but I don't want to live in the public eye like that or have to "play the game" to get ahead
- Believe I would be good manager, but not sure I want to spend all my time just managing people
- What to be known as an independent thinker and creative problem solver, as somebody who can analyze tough situations and figure out solutions that others might not consider
- Are there jobs where I could focus on troubleshooting, improving processes, or designing new systems?

What experiences from your past give you insight into where you would like to go in the future?

Where do you stand now in terms of your education and career, and what do you know about yourself?

What would you like your future to be? What do you like and dislike? What would you like to explore? If you haven't figured everything out yet, that's fine—as long as you've started to think about the future.

**Figure 13.1 Writing the Story of You**
Writing the "story of you" is a helpful way to think through where you've been in your life and career so far, where you are now, and where you would like to go from here. Remember that this is a private document designed to help you clarify your thoughts and plans, although you probably will find ways to adapt some of what you've written to various job-search documents, including your résumé.

to our customers, is so rare it will almost guarantee you get hired," explains the recruiting manager at Alcon Laboratories.[3]

Table 13.1 lists some of the many websites where you can learn more about companies and find job openings. Start with The Riley Guide, which offers advice for online job searches as well as links to hundreds of specialized websites that post openings in specific industries and professions. Your college's career center placement office probably maintains an up-to-date list as well.

To learn more about contemporary business topics, peruse leading business periodicals and newspapers with significant business sections (in some cases, you may need to go through your library's online databases in order to access back issues).

Employers expect you to be familiar with important developments in their industries, so stay on top of business news.

In addition, thousands of bloggers, microbloggers, and podcasters offer news and commentary on the business world. AllTop is another good resource for finding people who write about topics that interest you. In addition to learning more about professions and opportunities, this research will help you get comfortable with the jargon and buzzwords currently in use in a particular field, including essential *keywords* to use in your résumé (see page 393).

TABLE 13.1 **Selected Job-Search Websites**

| Website* | URL | Highlights |
|---|---|---|
| Riley Guide | www.rileyguide.com | Vast collection of links to both general and specialized job sites for every career imaginable; don't miss this one—it could save you hours of searching |
| TweetMyJobs.com | http://tweetmyjobs.com | The largest Twitter job board, with thousands of channels segmented by geography, job type, and industry |
| CollegeRecruiter.com | www.collegerecruiter.com | Focused on opportunities for graduates with less than three years of work experience |
| Monster | www.monster.com | One of the most popular job sites, with hundreds of thousands of openings, many from hard-to-find small companies; extensive collection of advice on the job-search process |
| MonsterCollege | http://college.monster.com | Focused on job searches for new college grads; your school's career center site probably links here |
| CareerBuilder | www.careerbuilder.com | One of the largest job boards; affiliated with more than 150 newspapers around the country |
| Jobster | www.jobster.com | Uses social networking to link employers with job seekers |
| USAJOBS | www.usajobs.gov | The official job search site for the U.S. government, featuring everything from jobs for economists to astronauts to border patrol agents |
| IMDiversity | www.imdiversity.com | Good resource on diversity in the workplace, with job postings from companies that have made a special commitment to promoting diversity in their workforces |
| Dice.com | www.dice.com | One of the best sites for high-technology jobs |
| Net-Temps | www.net-temps.com | Popular site for contractors and freelancers looking for short-term assignments |
| Internship Programs.com | http://internshipprograms.com | Posts listings from companies looking for interns in a wide variety of professions |
| Simply Hired<br>Indeed | www.simplyhired.com<br>www.indeed.com | Specialized search engines that look for job postings on hundreds of websites worldwide; they find many postings that aren't listed on job board sites such as Monster |

**Note:* This list represents only a small fraction of the hundreds of job-posting sites and other resources available online; be sure to check with your college's career center for the latest information.

*Sources:* Individual websites, all accessed 3 May 2014.

**MOBILE APPS**

Indeed.com's mobile app lets you search for jobs and apply from your phone.

Take advantage of job-search apps as well, including those offered by job-posting websites and major employers. You can use them to learn more about the company as well as about specific jobs.

## TRANSLATING YOUR GENERAL POTENTIAL INTO A SPECIFIC SOLUTION FOR EACH EMPLOYER

An essential task in your job search is presenting your skills and accomplishments in a way that is relevant to the employer's business challenges.

An important aspect of the employer's quality-of-hire challenge is trying to determine how well a candidate's attributes and experience will translate into the demands of a specific position. As a job candidate, customizing your résumé to each job opening is an important step in showing employers that you will be a good fit. As you can see from the sample résumés in Figures 13.3 through 13.5 on pages 397–399, customizing your résumé is not difficult if you have done your research. From your initial contact all the way through the interviewing process, in fact, you will have opportunities to impress recruiters by explaining how your general potential translates to the specific needs of the position.

## TAKING THE INITIATIVE TO FIND OPPORTUNITIES

When it comes to finding the right opportunities for you, the easiest ways are not always the most productive ways. The major job boards such as Monster and classified services such as Craigslist might have thousands of openings, but thousands of job seekers are looking at and applying for these same openings. Moreover, posting job openings on these sites is often a company's last resort, after it has exhausted other possibilities.

Don't hesitate to contact interesting companies even if they haven't advertised job openings to the public yet—they might be looking for somebody just like you.

To maximize your chances, take the initiative and go find opportunities. Identify the companies you want to work for and focus your efforts on them. Get in touch with their human resources departments (or individual managers, if possible), describe what you can offer the company, and ask to be considered if any opportunities come up.[4] Reach out to company representatives on social networks. Your message might appear right when a company is busy looking for someone but hasn't yet advertised the opening to the outside world.

## BUILDING YOUR NETWORK

**Networking** is the process of making informal connections with mutually beneficial business contacts. Networking takes place wherever and whenever people talk: at industry functions, at social gatherings, at alumni reunions—and all over the Internet, from LinkedIn and Twitter to Facebook and Google+. In addition to making connections through social media tools, you might get yourself noticed by company recruiters.

Start thinking like a networker now; your classmates could turn out to be some of your most important business contacts.

Networking is more essential than ever, because the vast majority of job openings are never advertised to the general public. To avoid the time and expense of sifting through thousands of applications and the risk of hiring complete strangers, most companies prefer to ask their employees for recommendations first.[5] The more people who know you, the better chance you have of being recommended for one of these hidden job openings.

Start building your network now, before you need it. Your classmates could end up being some of your most valuable contacts, if not right away then possibly later in your career. Then branch out by identifying people with similar interests in your target professions, industries, and companies. Read news sites, blogs, and other online sources. Follow industry leaders on Twitter. You can also follow individual executives at your target companies to learn about their interests and concerns.[6] Be on the lookout for career-oriented *Tweetups*, in which people who've connected on Twitter get together for in-person networking events. Connect with people on LinkedIn and Facebook, particularly in groups dedicated to particular career interests. Depending on the system and the settings on individual users' accounts, you may be able to introduce yourself via public or private messages. Just make sure you are respectful of people, and don't take up much of their time.[7]

Put your network in place before you need it.

Participate in student business organizations, especially those with ties to professional organizations. Visit *trade shows* to learn about various industries and rub shoulders with people who work in those industries.[8] Don't overlook volunteering; you not only meet people but also demonstrate your ability to solve problems, manage projects, and lead others. You can do some good while creating a network for yourself.

**MOBILE APPS**
Stay in touch with your professional network with LinkedIn's mobile app.

Remember that networking is about people helping each other, not just about other people helping you. Pay close attention to networking etiquette: Try to learn something about the people you want to connect with, don't overwhelm others with too many messages or requests, be succinct in all your communication efforts, don't give out other people's names and contact information without their permission to do so, never email your résumé to complete strangers, and remember to say thank you every time someone helps you.[9]

To become a valued network member, you need to be able to help others in some way. You may not have any influential contacts yet, but because you're researching industries and trends as part of your own job search, you probably have valuable information you can share via your online and offline networks. Or you might simply be able to connect one person with another who can help. The more you network, the more valuable you become in your network—and the more valuable your network becomes to you.

Networking is a mutually beneficial activity, so look for opportunities to help others in some way.

Finally, be aware that your online network reflects on who you are in the eyes of potential employers, so exercise some judgment in making connections. Also, many employers now contact people in a candidate's public network for background information, even if the candidate doesn't list those people as references.[10]

## SEEKING CAREER COUNSELING

Your college's career center probably offers a wide variety of services, including individual counseling, job fairs, on-campus interviews, and job listings. Counselors can advise on career planning and provide workshops on job-search techniques, résumé preparation, job readiness training, interview techniques, self-marketing, and more.[11] You can also find career planning advice online. Many of the websites listed in Table 13.1 offer articles and online tests to help you choose a career path, identify essential skills, and prepare to enter the job market.

Don't overlook the many resources available through your college's career center.

### AVOIDING MISTAKES

Don't let a silly mistake knock you out of contention for a great job.

While you're making all these positive moves to show employers you will be a quality hire, take care to avoid the simple blunders that can torpedo a job search, such as not catching mistakes in your résumé, misspelling the name of a manager you're writing to, showing up late for an interview, tweeting something unprofessional, failing to complete application forms correctly, asking for information that you can easily find yourself on a company's website, or making any other error that could flag you as someone who is careless or disrespectful. Busy recruiters will seize on these errors as a way to narrow the list of candidates they need to spend time on, so don't give them a reason to toss out your résumé.

Also, assume that every employer will conduct an online search on you, because most do. They want to know what your LinkedIn profile looks like and whether you've posted anything career-damaging on Twitter, YouTube, or other sites. If they don't like what they see or if what they see doesn't match what they read on your résumé, you won't be invited for an interview.[12]

## Planning Your Résumé

**2 LEARNING OBJECTIVE** Explain the process of planning your résumé, including how to choose the best résumé organization.

Although you will create many messages during your career search, your résumé will be the most important document in this process. You will be able to use it directly in many instances, adapt it to a variety of uses such as an e-portfolio or a social media résumé, and reuse pieces of it in social networking profiles and online application forms. Even if you apply to a company that doesn't want to see résumés from applicants, the process of developing your résumé will prepare you for interviewing and preemployment testing.

Developing a résumé is one of those projects that really benefits from multiple planning, writing, and completing sessions spread out over several days or weeks. You are trying to summarize a complex subject (yourself!) and present a compelling story to strangers in a brief document. Follow the three-step writing process (see Figure 13.2) and give yourself plenty of time.

Before you dive into your résumé, be aware that you will find a wide range of opinions about résumés, regarding everything from appropriate length, content, design, distribution methods, and acceptable degrees of creativity to whether it even makes sense to write a traditional résumé in this age of online applications. For example, you may encounter a prospective employer that wants you to tweet your résumé or submit all the links that make up your online presence, rather than submitting a conventional résumé.[13] You may run across examples of effective résumés that were produced as infographics, interactive videos, simulated search engine results, puzzles, games, graphic novels—you name it, somebody has probably tried it.

You will see lots of ideas and even some conflicting advice about résumés; use what you know about effective business communication to decide what is right for your résumés.

When you hear conflicting advice or see trendy concepts that you might be tempted to try, remember the most important question in business communication: What is the most effective way to adapt your message to the individual needs of each member of your audience? An approach that is wildly successful with one company or in one industry could be a complete disaster in another industry. To forge your own successful path through this maze of information, get inside the heads of the people you are trying to reach—try to think the way they think—and then apply the principles of effective communication you are learning in this course.

### ANALYZING YOUR PURPOSE AND AUDIENCE

Once you view your résumé as a persuasive business message, it's easier to decide what should and shouldn't be in it.

Planning an effective résumé starts with understanding its true function—as a brief, persuasive business message intended to stimulate an employer's interest in meeting you and learning more about you (see Table 13.2). In other words, the purpose of a résumé is not to get you a job but rather to get you an interview.[14]

Thanks to Twitter, LinkedIn, and other social media, you can often learn valuable details about individual managers in your target employers.

As you conduct your research on various professions, industries, companies, and individual managers, you will have a better perspective on your target readers and their information needs. Learn as much as you can about the individuals who may be reading your résumé. Many professionals and managers are bloggers, Twitter users, and LinkedIn

**1 Plan →**

**Analyze the Situation**
Recognize that the purpose of your résumé is to get an interview, not to get a job.

**Gather Information**
Research target industries and companies so that you know what they're looking for in new hires; learn about various jobs and what to expect; learn about the hiring manager, if possible.

**Choose Media and Channels**
Start with a traditional paper résumé and develop scannable, plain text, PDF, and social/online versions, as needed. Consider other formats as supplements.

**Organize the Information**
Choose an organizational model that highlights your strengths and downplays your shortcomings; use the chronological approach unless you have a strong reason not to.

**2 Write →**

**Adapt to Your Audience**
Plan your wording carefully so that you can catch a recruiter's eye within seconds; translate your education and experience into attributes that target employers find valuable.

**Compose the Message**
Write clearly and succinctly, using active, powerful language that is appropriate to the industries and companies you're targeting; use a professional tone in all communications.

**3 Complete**

**Revise the Message**
Evaluate content and review readability and then edit and rewrite for conciseness and clarity.

**Produce the Message**
Use effective design elements and suitable layout for a clean, professional appearance; seamlessly combine text and graphical elements. When printing, use quality paper and a good printer.

**Proofread the Message**
Review for errors in layout, spelling, and mechanics; mistakes can cost you interview opportunities.

**Distribute the Message**
Deliver your résumé, carefully following the specific instructions of each employer or job board website.

**Figure 13.2 Three-Step Writing Process for Résumés**
Following the three-step writing process will help you create a successful résumé in a short time. Remember to pay particular attention to the "you" attitude and presentation quality; your résumé will probably get tossed aside if it doesn't speak to audience needs or if it contains mistakes.

**TABLE 13.2 Fallacies and Facts About Résumés**

| Fallacy | Fact |
|---|---|
| The purpose of a résumé is to list all your skills and abilities. | The purpose of a résumé is to kindle employer interest and generate an interview. |
| A good résumé will get you the job you want. | All a résumé can do is get you in the door. |
| Your résumé will always be read carefully and thoroughly. | In most cases, your résumé needs to make a positive impression within a few seconds; only then will someone read it in detail. Moreover, it will likely be screened by a computer looking for keywords first—and if it doesn't contain the right keywords, a human being may never see it. |
| The more good information you present about yourself in your résumé, the better, so stuff your résumé with every positive detail. | Recruiters don't need that much information about you at the initial screening stage, and they probably won't read it. |

members, for example, so you can learn more about them online even if you've never met them. Any bit of information can help you craft a more effective message.

By the way, if employers ask to see your "CV," they're referring to your *curriculum vitae*, the term used instead of *résumé* in academic professions and in many countries outside the United States. Résumés and CVs are essentially the same, although CVs can be much more detailed and include personal information that is not included in a résumé.

**REAL-TIME UPDATES**
LEARN MORE BY VISITING THIS WEBSITE

**Converting your résumé to a CV**

If you need to convert your U.S-style résumé to the *curriculum vitae* format used in many other countries (and in many academic positions in the United States), this website will tell you everything you need to know. Go to **http://real-timeupdates.com/bce7**. Under "Students," click on "Learn More."

## GATHERING PERTINENT INFORMATION

If you haven't been building an employment portfolio thus far, you may need to do some research on yourself at this point. Gather all the pertinent personal history you can think of, including all the specific dates, duties, and accomplishments from any previous jobs you've held. Compile all your educational accomplishments, including formal degrees, training certificates, professional and technical certifications, academic awards, and scholarships. Also, gather information about school or volunteer activities that might be relevant to your job search, including offices you have held in any club or professional organization, presentations given, and online or print publications. You probably won't use every piece of information you come up with, but you'll want to have it at your fingertips.

## SELECTING THE BEST MEDIA AND CHANNELS

You should expect to produce your résumé in several media and formats. "Producing Your Résumé" on page 400 discusses your options.

## ORGANIZING YOUR RÉSUMÉ AROUND YOUR STRENGTHS

Although there are a number of ways to organize a résumé, most are some variation of chronological organization, functional organization, or a combination of the two. The right choice depends on your background and your goals.

### The Chronological Résumé

The chronological résumé is the most common approach, but it might not be right for you at this stage in your career.

In a **chronological résumé**, the work experience section dominates and is placed immediately after your contact information and introductory statement (see Figure 13.5 on page 399 for an example). The chronological approach is the most common way to organize a résumé, and many employers prefer this format because it presents your professional history in a clear, easy-to-follow arrangement.[15] If you're just graduating from college and have limited professional experience, you can vary this chronological approach by putting your educational qualifications before your experience.

Develop your work experience section by listing your jobs in reverse chronological order, beginning with the most recent one and giving more space to the most recent positions you've held. For each job, start by listing the employer's name and location, your official job title, and the dates you held the position (write "to present" if you are still in your most recent job). Next, in a short block of text, highlight your accomplishments in a way that is relevant and understandable to your readers. If the general responsibilities of the position are not obvious from the job title, provide a little background to help readers understand what you did.

### The Functional Résumé

The functional résumé is often considered by people with limited or spotty employment history, but many employers are suspicious of this format.

A **functional résumé**, sometimes called a *skills résumé*, emphasizes your skills and capabilities, identifying employers and academic experience in subordinate sections. This arrangement stresses individual areas of competence rather than job history. The functional approach has three benefits: (1) Without having to read through job descriptions, employers can get an idea of what you can do for them; (2) you can emphasize earlier job experience through the skills you gained in those positions; and (3) you can deemphasize any lengthy unemployment or lack of career progress. However, you should be aware that because the functional résumé can obscure your work history, many employment professionals are suspicious of it.[16] Moreover, it lacks the evidence of job experience that supports your skills claims. If you don't believe the chronological format will work for you, consider the combination résumé instead.

### The Combination Résumé

A **combination résumé** meshes the skills focus of the functional format with the job history focus of the chronological format. Figures 13.3 (page 397) and 13.4 (page 398) show examples of combination résumés. The chief advantage of this format is that it allows you to highlight your capabilities and education when you don't have a long or steady employment history, without raising concerns that you might be hiding something about your past.

If you don't have a lot of work history to show, consider a combination résumé to highlight your skills while still providing a chronological history of your employment.

As you look at a number of sample résumés, you'll probably notice many variations on the three basic formats presented here. Study these other options in light of the effective communication principles you've learned in this course and the unique circumstances of your job search. If you find one that seems like the best fit for your unique situation, by all means use it.

## ADDRESSING AREAS OF CONCERN

Many people have gaps in their careers or other issues that could be a concern for employers. Here are some common issues and suggestions for handling them in a résumé:[17]

- **Frequent job changes.** If you've had a number of short-term jobs of a similar type, such as independent contracting and temporary assignments, you can group them under a single heading. Also, if past job positions were eliminated as a result of layoffs or mergers, find a subtle way to convey that information (if not in your résumé, then in your cover letter). Reasonable employers understand that many professionals have been forced to job hop by circumstances beyond their control.
- **Gaps in work history.** Mention relevant experience and education you gained during employment gaps, such as volunteer or community work.
- **Inexperience.** Mention related volunteer work and membership in professional groups. List relevant coursework and internships.
- **Overqualification.** Tone down your résumé, focusing exclusively on the experience and skills that relate to the position.
- **Long-term employment with one company.** Itemize each position held at the firm to show growth within the organization and increasing responsibilities along the way.
- **Job termination for cause.** Be honest with interviewers and address their concerns with proof, such as recommendations and examples of completed projects.
- **Criminal record.** You don't necessarily need to disclose a criminal record or time spent incarcerated on your résumé, but you may be asked about it on job application forms. Laws regarding what employers may ask (and whether they can conduct a criminal background check) vary by state and profession, but if you are asked and the question applies to you, you are legally bound to answer truthfully. Use the interview process to explain any mitigating circumstances and to emphasize your rehabilitation and commitment to being a law-abiding, trustworthy employee.[18]

**REAL-TIME UPDATES**
LEARN MORE BY READING THIS ARTICLE

**Smart strategies to explain gaps in your work history**

Follow these three key pieces of advice if you have been or were out of work for a period of time. Go to **http://real-timeupdates.com/bce7**. Under "Students," click on "Learn More."

# Writing Your Résumé

**3** LEARNING OBJECTIVE
Describe the tasks involved in writing your résumé, and list the sections to consider including in your résumé.

With the necessary information and a good plan in hand, you're ready to begin writing. If you feel uncomfortable writing about yourself, you're not alone. Many people, even accomplished writers, can find it difficult to write their own résumés. If you get stuck, imagine you are somebody else, writing a résumé for this person called you. By "being your own client" in this sense, you might find the words and ideas flow more easily. You can also find a classmate or friend who is writing a résumé and swap projects for a while. Working on each other's résumés might speed up the process for both of you.

If you're uncomfortable writing your own résumé, you might try to trade with a classmate and write each other's résumé.

## KEEPING YOUR RÉSUMÉ HONEST

Estimates vary, but one comprehensive study uncovered lies about work history in more than 40 percent of the résumés tested.[19] And dishonest applicants are getting bolder all the time—going so far as to buy fake diplomas online, pay a computer hacker to insert their names into prestigious universities' graduation records, and sign up for services that offer phony employment verification.[20] "It's becoming common to cheat," observes Professor George Gollin of the University of Illinois, Urbana, mentioning the 200,000 fake college degrees sold every year as one example.[21]

Résumé fraud has reached epidemic proportions, but employers are fighting back with more rigorous screening techniques.

Applicants with integrity know they don't need to stoop to lying. If you are tempted to stretch the truth, bear in mind that professional recruiters have seen all sorts of fraud by job applicants, and frustrated employers are working aggressively to uncover the truth. Nearly all employers do some form of background checking, from contacting references and verifying employment to checking criminal records and sending résumés through verification services.[22] Employers are also beginning to craft certain interview questions specifically to uncover dishonest résumé entries.[23]

More than 90 percent of companies that find lies on résumés refuse to hire the offending applicants, even if that means withdrawing formal job offers.[24] And if you do sneak past these filters and get hired, you'll probably be exposed on the job when you can't live up to your own résumé. Given the networked nature of today's job market, lying on a résumé could haunt you for years—and you could be forced to keep lying throughout your career to hide the misrepresentations on your original résumé.[25]

## ADAPTING YOUR RÉSUMÉ TO YOUR AUDIENCE

Translate your past accomplishments into a compelling picture of what you can do for employers in the future.

The importance of adapting your résumé to your target readers' needs and interests cannot be overstated. In a competitive job market, the more you look like a good fit—a quality hire—the better your chances of securing interviews. Address your readers' business concerns by showing how your capabilities meet the demands and expectations of the position and the organization as a whole.

**MOBILE APPS**

Need a simple résumé in a hurry? Resume App Pro and Resume Builder Pro let you build one right on your phone.

For example, an in-house public relations (PR) department and an independent PR agency perform many of the same tasks, but the outside agency must also sell its services to multiple clients. Consequently, it needs employees who are skilled at attracting and keeping paying customers, in addition to being skilled at PR. If you are applying for both in-house and agency PR jobs, you need to adapt your résumé for each of these audiences.

An essential step in adapting your résumé is using the same terminology as the employer uses to describe job responsibilities and professional accomplishments. In Figures 13.3 through 13.5 starting on page 399, you can see how the sample résumés do this, echoing key terms and phrases from the job postings. With the rise of automated *applicant tracking systems*, matching your language to the employer's will help you get past the keyword filters these systems use to rank incoming résumés.

Military service and other specialized experiences may need to be "translated" into terms more readily understandable by your target readers.

If you are applying for business positions after military service or moving from one industry to another, you may need to "translate" your experience into the language of your target employers. For instance, military experience can help you develop many skills that are valuable in business, but military terminology can sound like a foreign language to people who aren't familiar with it. Isolate the important general concepts and present them in the business language your target employers use.

**REAL-TIME UPDATES**

LEARN MORE BY READING THIS INFOGRAPHIC

**See how an applicant tracking system handles your résumé**

Once you see how the system works, you'll understand why it's so crucial to customize the wording on your résumé for every job opening. Go to **http://real-timeupdates.com/bce7**. Under "Students," click on "Learn More."

## COMPOSING YOUR RÉSUMÉ

Write your résumé using a simple and direct style. Use short, crisp phrases instead of whole sentences, and focus on what your reader needs to know. Avoid using the word *I*, which can sound both self-involved and repetitious by the time you outline all your skills and accomplishments. Instead, start your phrases with strong action verbs such as these:[26]

| | | | | |
|---|---|---|---|---|
| accomplished | coordinated | initiated | participated | set up |
| achieved | created | installed | performed | simplified |
| administered | demonstrated | introduced | planned | sparked |
| approved | developed | investigated | presented | streamlined |
| arranged | directed | launched | proposed | strengthened |
| assisted | established | maintained | raised | succeeded |
| assumed | explored | managed | recommended | supervised |
| budgeted | forecasted | motivated | reduced | systematized |
| chaired | generated | negotiated | reorganized | targeted |
| changed | identified | operated | resolved | trained |
| compiled | implemented | organized | saved | transformed |
| completed | improved | oversaw | served | upgraded |

For example, you might say, "Created a campus organization for students interested in entrepreneurship" or "Managed a fast-food restaurant and four employees." Whenever you can, quantify the results so that your claims don't come across as empty puffery. Don't just say that you're a team player or detail oriented—show that you are by offering concrete proof.[27] Here are some examples of phrasing accomplishments using active statements that show results:

Draft your résumé using short, crisp phrases built around strong verbs and nouns.

| Instead of This | Write Active Statements That Show Results |
|---|---|
| Responsible for developing a new filing system | Developed a new filing system that reduced paperwork by 50 percent |
| I was in charge of customer complaints and all ordering problems | Handled all customer complaints and resolved all product order discrepancies |
| I won a trip to Europe for opening the most new customer accounts in my department | Generated the highest number of new customer accounts in my department |
| Member of special campus task force to resolve student problems with existing cafeteria assignments | Assisted in implementing new campus dining program that balances student wishes with cafeteria capacity |

Providing specific supporting evidence is vital, but make sure you don't go overboard with details.[28] Carefully select the most compelling evidence so that your message is clear and immediate.

In addition to clear writing with specific examples, the particular words and phrases used throughout your résumé are critically important. The majority of résumés are now subjected to *keyword searches* in an applicant tracking system or other database, in which a recruiter searches for résumés most likely to match the requirements of a particular job. Résumés that don't closely match the requirements may never be seen by a human reader, so it is essential to use the words and phrases that a recruiter is most likely to search on. (Although most experts used to advise including a separate *keyword summary* as a standalone list, the trend nowadays is to incorporate your keywords into your introductory statement and other sections of your résumé.)[29]

Include relevant *keywords* in your introductory statement, work history, and education sections.

Identifying these keywords requires some research, but you can uncover many of them while you are researching various industries and companies. In particular, study job descriptions carefully. In contrast to the action verbs that catch a human reader's attention, keywords that catch a computer's attention are usually nouns that describe the specific skills, attributes, and experiences an employer is looking for in a candidate. Keywords can include the business and technical terms associated with a specific profession, industry-specific jargon, names or types of products or systems used in a profession, job titles, and college degrees.[30]

**REAL-TIME UPDATES**

LEARN MORE BY VISITING THIS WEBSITE

**Find the keywords that will light up your résumé**

This list of tips and tools will help you find the right keywords to customize your résumé for every opportunity. Go to **http://real-timeupdates.com/bce7**. Under "Students," click on "Learn More."

## Name and Contact Information

Be sure to provide complete and accurate contact information; mistakes in this section of the résumé are surprisingly common.

Your name and contact information constitute the heading of your résumé; include the following:

- Name
- Address (both permanent and temporary, if you're likely to move during the job-search process)
- Email address
- Phone number(s)
- The URL of your personal webpage, e-portfolio, or social media résumé (if you have one)

Use a professional-sounding email address for business correspondence, such as *firstname .lastname@something.com*).

If the only email address you have is through your current employer, get a free personal email address from one of the many services that offer them. It's not fair to your current employer to use company resources for a job search, and doing so sends a bad signal to potential employers. Also, if your personal email address is anything like precious.princess@something.com or PsychoDawg@something.com, get a new email address for your business correspondence.

## Introductory Statement

Of all the parts of a résumé, the brief introductory statement that follows your name and contact information probably generates the most disagreement. You can put one of three things here:[31]

You can choose to open with a career objective, a qualifications summary, or a career summary.

- **Career objective.** A career objective identifies either a specific job you want to land or a general career track you would like to pursue. Some experts advise against including a career objective because it can categorize you so narrowly that you miss out on interesting opportunities, and it is essentially about fulfilling your desires, not about meeting the employer's needs. In the past, most résumés included a career objective, but in recent years more job seekers are using a qualifications summary or a career summary. However, if you have little or no work experience in your target profession, a career objective might be your best option. If you do opt for an objective, word it in a way that relates your qualifications to employer needs.
- **Qualifications summary.** A qualifications summary offers a brief view of your key qualifications. The goal is to let a reader know within a few seconds what you can deliver. You can title this section generically as "Qualifications Summary" or "Summary of Qualifications," or, if you have one dominant qualification, you can use that as the title. Consider using a qualifications summary if you have one or more important qualifications but don't yet have a long career history. Also, if you haven't been working long but your college education has given you a dominant professional "theme," such as multimedia design or statistical analysis, you can craft a qualifications summary that highlights your educational preparedness.
- **Career summary.** A career summary offers a brief recap of your career with the goal of presenting increasing levels of responsibility and performance (see Figure 13.5 on page 399 for an example). A career summary can be particularly useful for managers who have demonstrated the ability to manage increasingly larger and more complicated business operations—a key consideration when companies look to hire upper-level executives.

If you have a reasonably focused skill set but don't yet have a long career history, a qualifications summary is probably the best type of introductory statement for you.

Whichever option you choose, make sure it includes many of the essential keywords you identified in your research—and adapt these words and phrases to each job opportunity as needed.

## Education

If you are early in your career, your education is probably your strongest selling point.

If you're still in college or have recently graduated, education is probably your strongest selling point. Present your educational background in depth, choosing facts that support your professional theme. Give this section a heading such as "Education," "Technical Training," or "Academic Preparation," as appropriate. Then, starting with the most recent, list the name and location of each school you have attended, the month and year of your graduation (say "anticipated graduation: _____" if you haven't graduated yet), your major and minor fields of study, significant skills and abilities you've developed in your coursework, and the degrees or certificates you've earned. Fine-tune your message by listing courses that are most relevant to each job opening, and indicate any scholarships, awards, or academic honors you've received.

**REAL-TIME UPDATES**
LEARN MORE BY WATCHING THIS VIDEO
**Learn to use LinkedIn's résumé builder**
See how to build and customize a résumé on LinkedIn, and then use it on other social networking sites. Go to **http://real-timeupdates.com/bce7**. Under "Students," click on "Learn More."

The education section should also include relevant training sponsored by business or government organizations. Mention high school or military training only if the associated achievements are pertinent to your career goals.

Whether you list your grade point average depends on the job you want and the quality of your grades. If you don't show your GPA on your résumé—and there's no rule saying you have to—be prepared to answer questions about it during the interview process because many employers will assume that your GPA is not spectacular if you didn't list it on your résumé. If you choose to show a grade point average, be sure to mention the scale, especially if it isn't a four-point scale. If your grades are better within your major than in other courses, you can also list your GPA as "Major GPA" and include only those courses within your major.

### Work Experience, Skills, and Accomplishments

This section can be called "Work Experience," "Professional Experience," or "Work and Volunteer Experience," if you have limited work experience and want to bolster that with volunteer experience. Like the education section, the work experience section should focus on your overall theme in a way that shows how your past can contribute to an employer's future. Use keywords to call attention to the skills you've developed on the job and to your ability to handle responsibility. Emphasize what you accomplished in each position, not just the generic responsibilities of the job.

When you describe past job responsibilities, identify the skills and knowledge that you can apply to a future job.

List your jobs in reverse chronological order, starting with the most recent. Include military service and any internships and part-time or temporary jobs related to your career objective. Include the name and location of the employer, and if readers are unlikely to recognize the organization, briefly describe what it does. When you want to keep the name of your current employer confidential, you can identify the firm by industry only ("a large video game developer"). If an organization's name or location has changed since you worked there, state the current name and location and include the old information preceded by "formerly . . ." Before or after each job listing, state your job title and give the years you worked in the job; use the phrase "to present" to denote current employment. Indicate whether a job was part-time.

Devote the most space to the jobs that are most recent or most closely related to your target position. If you were personally responsible for something significant, be sure to mention it. Facts about your skills and accomplishments are the most important information you can give a prospective employer, so quantify them whenever possible.

Devote the most space to jobs that are related to your target position.

One helpful exercise is to write a 30-second "commercial" for each major skill you want to highlight. The commercial should offer proof that you really do possess the skill. For your résumé, distill the commercials down to brief phrases; you can use the more detailed proof statements in cover letters and as answers to interview questions.[32]

If you have a number of part-time, temporary, or entry-level jobs that don't relate to your career objective, you have to use your best judgment when it comes to including or excluding them. Too many minor and irrelevant work details can clutter your résumé, particularly if you've been in the professional workforce for a few years. However, if you don't have a long employment history, including these jobs shows your ability and willingness to keep working.

### Activities and Achievements

This optional section can be used to highlight activities and achievements outside of a work or educational context—but only if they make you a more attractive job candidate. For example, traveling, studying, or working abroad and fluency in multiple languages could weigh heavily in your favor with employers who do business internationally.

Include personal accomplishments only if they suggest special skills or qualities that are relevant to the jobs you're seeking.

Because many employers are involved in their local communities, they tend to look positively on applicants who are active and concerned members of their communities as well. Consider including community service activities that suggest leadership, teamwork, communication skills, technical aptitude, or other valuable attributes.

You should generally avoid indicating membership or significant activity in religious or political organizations (unless, of course, you're applying to such an organization) because doing so might raise concerns among people with differing beliefs or affiliations. However, if you want to highlight skills you developed while involved with such a group, you can refer to it generically as a "not-for-profit organization."

Finally, if you have little or no job experience and not much to discuss outside of your education, indicating involvement in athletics or other organized student activities lets employers know that you don't spend all your free time hanging around your apartment playing video games. Also consider mentioning publications, projects, and other accomplishments that required relevant business skills.

### Personal Data and References

When applying to U.S. companies, your résumé should not include any personal data such as age, marital status, physical description, or Social Security number.

In nearly all instances, your résumé should not include any personal data beyond the information described in the previous sections. When applying to U.S. companies, never include any of the following: physical characteristics, age, gender, marital status, sexual orientation, religious or political affiliations, race, national origin, salary history, reasons for leaving jobs, names of previous supervisors, names of references, Social Security number, or student ID number.

However, be aware that standards can vary in other countries. For example, some international employers might require you to include your citizenship, nationality, or marital status.[33]

Prepare a list of references but don't include them on your résumé.

The availability of references is assumed, so you don't need to put "References available upon request" at the end of your résumé. However, be sure to have a list of several references ready when you begin applying for jobs. Prepare your reference sheet with your name and contact information at the top. For a finished look, use the same design and layout you use for your résumé. Then list three or four people who have agreed to serve as references. Include each person's name, job title, organization, address, telephone number, email address (if the reference prefers to be contacted by email), and the nature of your relationship.

Figures 13.3 through 13.5 show how a job applicant can put these guidelines to work in three job-search scenarios:

- **Scenario 1: Positioning yourself for an ideal opportunity** (when you've found a job opening that aligns closely with your career goals and your academic and professional credentials)
- **Scenario 2: Positioning yourself for an available opportunity** (when you can't find a job in your chosen field and need to adapt to whatever opportunities are available)
- **Scenario 3: Positioning yourself for more responsibility** (after you have some experience in your field and want to apply for positions of greater responsibility)

## Completing Your Résumé

4 LEARNING OBJECTIVE
Characterize the completing step for résumés, including the six most common formats in which you can produce a résumé.

Completing your résumé involves revising it for optimum quality, producing it in the various forms and media you'll need, and proofreading it for any errors before distributing it or publishing it online.

### REVISING YOUR RÉSUMÉ

Revise your résumé until it is as short and clear as possible.

Revising your résumé for clarity and conciseness is essential. Recruiters and hiring managers want to find key pieces of information about you, including your top skills, your current job, and your education, in a matter of seconds. Many are overwhelmed with résumés, and if they have to work to find or decode this information, chances are they'll toss yours aside and move on to the next one in the pile. Remember the fundamental purpose of the résumé—to get you an interview, not to get you a job. Weed out details and irrelevant information until your résumé is tight, clear, and focused.

**The Scenario**

You are about to graduate and have found a job opening that is in your chosen field. You don't have any experience in this field, but the courses you've taken in pursuit of your degree have given you a solid academic foundation for this position.

**The Opportunity**

The job opening is for an associate market analyst with Living Social, the rapidly growing advertising and social commerce service that describes itself as "the online source for discovering valuable local experiences." (A market analyst researches markets to find potentially profitable business opportunities.)

**The Communication Challenge**

You don't have directly relevant experience as a market analyst, and you might be competing against people who do. Your education is your strongest selling point, so you need to show how your coursework relates to the position.

Don't let your lack of experience hold you back; the job posting makes it clear that this is an entry-level position. For example, the first bullet point in the job description says "Become an expert in market data . . .," and the required skills and experience section says that "Up to 2 years of experience with similar research and analysis is preferred." The important clues here are *become* (the company doesn't expect you to be an expert already) and *preferred* (experience would be great if you have it, but it's not required).

**Keywords and Key Phrases**

You study the job posting and highlight the following elements:

1. Working in a team environment
2. Research, including identifying trendy new businesses
3. Analyzing data using Microsoft Excel
4. Managing projects
5. Collaborating with technical experts and sales staff
6. Creating new tools to help maximize revenue and minimize risks
7. Bachelor's degree is required
8. Natural curiosity and desire to learn
9. Detail oriented
10. Hands-on experience with social media

**Emma Gomes**
(847) 555-2153
emma.gomes@mailsystem.net
emmawrites.blogspot.com

**Address:**
860 North 8th Street, Terre Haute, IN 47809

**Permanent Address:**
993 Church Street, Barrington, IL 60010

Gomes includes phone and email contacts, along with a blog that features academic-oriented writing.

**Summary of Qualifications**

- ❷ In-depth academic preparation in marketing analysis techniques
- ❸ Intermediate skills with a variety of analytical tools, including Microsoft Excel and Google Analytics
- Front-line experience with consumers and business owners
- ❷ ❿ Multiple research and communication projects involving the business applications of social media

Using a *summary of qualifications* for her opening statement lets her target the résumé and highlight her most compelling attributes.

**Education**

❼ B.S. in Marketing (Marketing Management Track), Indiana State University, Terre Haute, IN, anticipated graduation: May 2014

Program coursework

- ❸ ❻ 45 credits of core business courses, including Business Information Tools, Business Statistics, Principles of Accounting, and Business Finance
- ❷ 27 credits of marketing and marketing management courses, including Buyer Behavior, Marketing Research, Product and Pricing Strategy, and seminars in e-commerce and social media

Special projects

- ❷ "Handcrafting a Global Marketplace: The Etsy Phenomenon," in-depth analysis of how Etsy transformed the market for handmade craft items by bringing e-commerce capabilities to individual craftspeople
- ❶ ❷ ❸ ❹ ❻ "Hybrid Communication Platforms for Small Businesses," team service project for five small businesses in Terre Haute, recommending best practices for combining traditional and social-media methods of customer engagement and providing a customized measurement spreadsheet for each company

Her education is a much stronger selling point than her work experience, so she goes into some detail—carefully selecting course names and project descriptions to echo the language of the job description.

**Work and Volunteer Experience**

**Independent math tutor, 2009-present.** Assist students with a variety of math courses at the elementary, junior high, and high school level; all clients have achieved combined test and homework score ❾ improvements of at least one full letter grade, with an average improvement of 38 percent

**Volunteer, LeafSpring Food Bank, Terre Haute, IN (weekends during college terms, 2012–present).** Stock food and supply pantries; prepare emergency baskets for new clients; assist director with public relations ❿ activities, including website updates and social media news releases.

❺ **Customer care agent, Owings Ford, Barrington, IL (summers, 2011–2013)**. Assisted the service and sales managers of this locally owned car dealership with a variety of customer-service tasks; scheduled service ❹ appointments; designed and implemented improvements to service-center waiting room to increase ❿ guest comfort; convinced dealership owners to begin using Twitter and Facebook to interact with current and potential customers.

She adjusts the descriptions and accomplishments of each role to highlight the aspects of her work and volunteer experience that are relevant to the position.

**Professional Engagement**

- ❽ Collegiate member, American Marketing Association; helped establish the AMA Collegiate Chapter at Indiana State
- Participated in AMA International Collegiate Case Competition, 2011-2012

**Awards**

- ❽ Dean's List: 2012, 2013
- Forward Youth award, Barrington Chamber of Commerce, 2010

The final sections highlight activities and awards that reflect her interest in marketing and her desire to improve her skills.

**Notice how Gomes adapts her résumé to "mirror" the keywords and phrases from the job posting:**

❶ Offers concrete evidence of teamwork (rather than just calling herself a "team player," for example)
❷ Emphasizes research skills and experience in multiple instances
❸ Calls out Microsoft Excel, as well as Google Analytics, a key online tool for measuring activity on websites
❹ Indicates the ability to plan and carry out projects, even if she doesn't have formal project management experience
❺ Indicates some experience working in a supportive or collaborative role with technical experts and sales specialists (the content of the work doesn't translate to the new job, but the concept does)
❻ Suggests the ability to work with new analytical tools
❼ Displays her B.S. degree prominently
❽ Demonstrates a desire to learn and to expand her skills
❾ Tracking the progress of her tutoring clients is strong evidence of a detail-oriented worker—not to mention someone who cares about results and the quality of her work
❿ Lists business-oriented experience with Facebook, Twitter, and other social media

**Figure 13.3 Crafting Your Résumé, Scenario 1: Positioning Yourself for an Ideal Opportunity**
Even for an ideal job-search scenario, where your academic and professional experiences and interests closely match the parameters of the job opening, you still need to adapt your résumé content carefully to "echo" the specific language of the job description. (Job description keywords and key phrases quoted or adapted in part from "Associate Market Analyst" job opening posted on LivingSocial website, accessed 9 July 2012, http://corporate.livingsocial.com.)

**The Scenario**

You are about to graduate but can't find job openings in the field you'd like to enter. However, you have found an opening that is in a related field, and it would give you the chance to get some valuable work experience.

**The Opportunity**

The job opening is for a seller support associate with Amazon, the online retail giant. Employees in this position work with merchants that sell products through the Amazon e-commerce system to make sure merchants are successful. In essence, it is a customer service job, but directed at these merchants, not the consumers who buy on Amazon.

**The Communication Challenge**

This isn't the job you ultimately want, but it is a great opportunity with a well-known company.

You note that the position does not require a college degree, so in that sense you might be a bit overqualified. However, you also see a strong overlap between your education and the responsibilities and required skills of the job, so be sure to highlight those.

**Keywords and Key Phrases**

You study the job posting and highlight the following elements:

1. Be able to predict and respond to merchant needs; good business sense with the ability to appreciate the needs of a wide variety of companies
2. Strong written and oral communication skills
3. High degree of professionalism
4. Self-starter with good time management skills
5. Logically analyze problems and devise solutions
6. Comfortable with computer-based tools, including Microsoft Excel
7. Desire to expand business and technical skills
8. Customer service experience
9. Collaborate with fellow team members to resolve difficult situations
10. Record of high performance regarding quality of work and personal productivity

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**Summary of Qualifications**

8 • Front-line customer service experience with consumers and business owners
• Strong business sense based on work experience and academic preparation
6 • Intermediate skills with a variety of software tools, including Microsoft Excel and Google Analytics
10 • Record of quality work in both business and academic settings

Gomes modified her summary of qualifications to increase emphasis on customer service.

**Education**

B.S. in Marketing (Marketing Management Track), Indiana State University, Terre Haute, IN, expected graduation May 2014

Program coursework

6 • 45 credits of core business courses, including Business Information Tools, Business Statistics, Principles of Accounting, and Business Finance
1 • 27 credits of marketing and marketing management courses, including Marketing Fundamentals, Buyer Behavior, Marketing Research, Retail Strategies and seminars in e-commerce and social media

She adjusts the selection of highlighted courses to reflect the retail and e-commerce aspects of this particular job opening.

Special projects

1 2 • "Handcrafting a Global Marketplace: The Etsy Phenomenon," in-depth analysis of how the Etsy e-commerce platform helps craftspeople and artisans become more successful merchants
1 2 9 • "Hybrid Communication Platforms for Small Businesses," team service project for five small businesses in Terre Haute, recommending best practices for combining traditional and social-media methods of customer engagement and providing a customized measurement spreadsheet for each company

She adjusts the wording of this Etsy project description to closely mirror what Amazon is—an e-commerce platform serving a multitude of independent merchants.

**Work and Volunteer Experience**

3 4 10 **Independent math tutor, 2009-present.** Assist students with a variety of math courses at the elementary, junior high, and high school level; all clients have achieved combined test and homework score improvements of at least one full letter grade, with an average improvement of 38 percent

2 **Volunteer, LeafSpring Food Bank, Terre Haute, IN (weekends during college terms, 2012–present).** Stock food and supply pantries; prepare emergency baskets for new clients; assist director with public relations activities, including website updates and social media news releases.

8 5 **Customer care agent, Owings Ford, Barrington, IL (summers, 2011–2013)**. Assisted the service and sales managers of this locally owned car dealership with a variety of customer-service tasks; scheduled service appointments; designed and implemented improvements to service-center waiting room to increase guest comfort; convinced dealership owners to begin using Twitter and Facebook to interact with current and potential customers.

She provides more detail regarding her customer support experience.

**Professional Engagement**

7 • Collegiate member, American Marketing Association; helped establish the AMA Collegiate Chapter at Indiana State
• Participated in AMA International Collegiate Case Competition, 2011-2012

**Awards**

3 4 10 • Dean's List: 2012, 2013
1 • Forward Youth award, Barrington Chamber of Commerce, 2010

The final sections are still relevant to this job opening, so she leaves them unchanged.

**Notice how Gomes adapts her résumé to "mirror" the keywords and phrases from the job posting:**

1. Suggests strong awareness of the needs of various businesses
2. Examples of experience with written business communication; she can demonstrate oral communication skills during phone, video, or in-person interviews
3. Results-oriented approach to tutoring business suggests high degree of professionalism, as do the two awards
4. The ability to work successfully as an independent tutor while attending high school and college is strong evidence of self-motivation and good time management
5. Indicates ability to understand problems and design solutions
6. Suggests the ability to work with a variety of software tools
7. Demonstrates a desire to learn and to expand her skills
8. Highlights customer service experience
9. Offers concrete evidence of teamwork (rather than just calling herself a "team player," for example)
10. Tracking the progress of her tutoring clients is strong evidence of someone who cares about results and the quality of her work; Dean's List awards also suggest quality of work; record of working while attending high school and college suggests strong productivity

**Figure 13.4 Crafting Your Résumé, Scenario 2: Repositioning Yourself for Available Opportunities**
If you can't find an ideal job opening, you'll need to adjust your plans and adapt your résumé to the openings that are available. Look for opportunities that meet your near-term financial needs while giving you the chance to expand your skill set so that you'll be even more prepared when an ideal opportunity does come along. (Job description keywords and key phrases quoted or adapted in part from "Seller Support Associate" job opening posted on Amazon website, accessed 12 July 2012, https://us-amazon.icims.com/jobs.)

**The Scenario**

Moving forward from Figures 13.4 and 13.5, let's assume you have worked in both those positions, first for two years as a seller support associate at Amazon and then for almost three years an associate market analyst at Living Social. You believe you are now ready for a bigger challenge, and the question is how to adapt your résumé for a higher-level position now that you have some experience in your chosen field. (Some of the details from the earlier résumés have been modified to accommodate this example.)

**The Opportunity**

The job opening is for a senior strategy analyst for Nordstrom. The position is similar in concept to the position at Living Social, but at a higher level and with more responsibility.

**The Communication Challenge**

This job is an important step up; a senior strategy analyst is expected to conduct in-depth financial analysis of business opportunities and make recommendations regarding strategy changes, merchandising partnerships with other companies, and important decisions.

You worked with a wide variety of retailers in your Amazon and Living Social jobs, including a number of fashion retailers, but you haven't worked directly in fashion retailing yourself.

Bottom line: You can bring a good set of skills to this position, but your financial analysis skills and retailing insights might not be readily apparent, so you'll need to play those up.

**Keywords and Key Phrases**

You study the job posting and highlight the following elements:

1. Provide research and analysis to guide major business strategy decisions
2. Communicate across business units and departments within Nordstrom
3. Familiar with retail analytics
4. Knowledge of fashion retailing
5. Qualitative and quantitative analysis
6. Project management
7. Strong communication skills
8. Bachelor's required; MBA preferred
9. Advanced skills in financial and statistical modeling
10. Proficient in PowerPoint and Excel

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**Market and Strategy Analyst**

1 3 • Five years of experience in local and online retailing, with three years of focus on market opportunity analysis

4 • Strong business sense developed through more than 60 marketing programs across a range of retail sectors, including hospitality, entertainment, and fashion

1 5 • Recognized by senior management for ability to make sound judgment calls in situations with incomplete or conflicting data

2 6 • Adept at coordinating research projects and marketing initiatives across organizational boundaries and balancing the interests of multiple stakeholders

9 10 • Advanced skills with leading analysis and communication tools, including Excel, PowerPoint, and Google Analytics

**Professional Experience**

**Associate Market Analyst, LivingSocial, Seattle, WA (July 2011-present).** Analyzed assigned markets for
1 such factors as consumer demand, merchandising opportunities, and seller performance; designed,
4 launched, and managed marketing initiatives in 27 retailing categories, including fashions and accessories;
7 met or exceeded profit targets on 90 percent of all marketing initiatives; appointed team lead/trainer in
3 5 recognition of strong quantitative and qualitative analysis skills; utilized both established and emerging
7 social media tools and helped business partners use these communication platforms to increase consumer engagement in local markets.

4 **Seller support associate, Amazon, Seattle, WA (July 2009–June 2011).** Worked with more than 300 product vendors, including many in the fashion and accessories sectors, to assure profitable retailing activities on the Amazon e-commerce platform; resolved vendor issues related to e-commerce
7 operations, pricing, and consumer communication; anticipated potential vendor challenges and assisted in
3 the development of more than a dozen new selling tools that improved vendor profitability while reducing Amazon's vendor support costs by nearly 15 percent.

**Education**

8 **Evening MBA program, University of Washington, Seattle, WA; anticipated graduation: May 2015.** Broad-based program combining financial reporting, marketing strategy, competitive strategy, and supply chain
1 management with individual emphasis on quantitative methods, financial analysis, and marketing decision
9 models.

9 **B.S. in Marketing (Marketing Management Track), Indiana State University, Terre Haute, IN, May 2009.** Comprehensive coursework in business fundamentals, accounting and finance, marketing fundamentals, retailing, and consumer communications.

**Professional Engagement**

• Member, American Marketing Association

• Member, International Social Media Association

4 • Active in National Retail Federation and Retail Advertising & Marketing Association

**Awards**

• Living Social Top Ten Deals (monthly employee achievement award for designing the most profitable couponing deals); awarded seven times, 2011—2013

• Social Commerce Network's Social Commerce Innovators: 30 Under 30; 2012

Gomes stays with a summary of qualifications as her opening statement but gives it a new title to reflect her experience and to focus on her career path as a market analyst.

Work experience is now her key selling point, so she shifts to a conventional chronological résumé that puts employment ahead of education. She also removes the part-time jobs she had during high school and college.

She updates the Education section with a listing for the MBA program she has started (selecting points of emphasis relevant to the job opening) and reduces the amount of detail about her undergraduate degree.

She updates the Professional Engagement and Awards section with timely and relevant information.

**Notice how Gomes adapts her résumé to "mirror" the keywords and phrases from the job posting:**

1. Highlights her experience in market and business analysis and her continuing education in this area
2. Mentions skill at coordinating cross-functional projects
3. Lists experiences that relate to the collection and analysis of retail data
4. Emphasizes the work she has done with fashion-related retailing and retailing in general
5. Identifies experience and education that relates to quantitative and qualitative analysis (this point overlaps #1 and #3 to a degree)
6. Mentions project management experience
7. Lists areas that suggest effective communication skills
8. Lists education, with emphasis on coursework that relates most directly to the job posting
9. Mentions work experience and educational background related to these topics
10. Includes these programs in the list of software tools she uses

MyBCommLab Apply Figure 13.5's key concepts by going to **mybcommlab.com**

**Figure 13.5 Crafting Your Résumé, Scenario 3: Positioning Yourself for More Responsibility**
When you have a few years of experience under your belt, your résumé strategy should shift to emphasize work history and accomplishments. Here is how Emma Gomes might reshape her résumé if she had held the two jobs described in Figures 13.3 and 13.4 and is now ready for a bigger challenge. (Job description keywords and key phrases quoted or adapted in part from "Senior Strategy Analyst" job opening posted on Nordstrom website, accessed 17 July 2012, http://careers.nordstrom.com.)

If your employment history is brief, keep your résumé to one page.

The ideal length of your résumé depends on the depth of your experience and the level of the positions for which you are applying. As a general guideline, if you have fewer than five years of professional experience, keep your conventional résumé to one page. For online résumé formats, you can always provide links to additional information. If you have more experience and are applying for a higher-level position, you may need to prepare a somewhat longer résumé.[34] For highly technical positions, longer résumés are often the norm as well because the qualifications for such jobs can require more description.

## PRODUCING YOUR RÉSUMÉ

Effective résumé designs are clear, clean, and professional.

No matter how many media and formats you eventually choose for producing your résumé, a clean, professional-looking design is a must. Recruiters and hiring managers typically want to skim your essential information in a matter of seconds, and anything that distracts or delays them will work against you.

### Choosing a Design Strategy for Your Résumé

Don't pick a résumé style just because it's trendy or different; make sure it works for your specific needs.

You'll find a wide range of résumé designs in use today, from text-only examples that follow a conventional layout to full-color infographics with unique designs. As with every type of business message, keep your audience, your goals, and your resources in mind. Don't choose a style just because it seems trendy or flashy or different. For example, you can find a lot of eye-catching infographic résumés online, but many of those are created by graphic designers applying for visual jobs in advertising, fashion, web design, and other areas in which graphic design skills are a must. In other words, the intended audience expects an applicant to have design skills, and the résumé is a good opportunity to demonstrate those. In contrast, a colorful, graphically intense résumé might just look odd to recruiters in finance, engineering, or other professions.

The sample résumés in Figures 13.3 through 13.5 use a classic, conservative design that will serve you well for most business opportunities. Notice how they feature simplicity, an easy-to-read layout, effective use of white space, and clear typefaces. Recruiters can pick out the key pieces of information in a matter of seconds.

With any résumé design, make sure that readers can find essential information in a matter of seconds.

You can certainly enhance your résumé beyond this style, but do so carefully and always with an eye on what will help the reader. Make subheadings easy to find and easy to read. Avoid big blocks of text, and use lists to itemize your most important qualifications. Color is not necessary by any means, but if you add color, make it subtle and sophisticated. Above all, don't make the reader work to find the key points of your story. Your résumé should be a high-efficiency information-delivery system, not a treasure hunt.

Depending on the companies you apply to, you might want to produce your résumé in as many as six formats (all are explained in the following sections):

Be prepared to produce versions of your résumé in multiple formats.

- Printed traditional résumé
- Printed scannable résumé
- Electronic plain-text file
- Microsoft Word file
- Online résumé
- PDF file

Unfortunately, no single format or medium will work for all situations, and employer expectations continue to change as technology evolves. Find out what each employer or job-posting website expects, and provide your résumé in that specific format.

### Considering Photos, Videos, Presentations, and Infographics

Do not include or enclose a photo in résumés that you send to employers or post on job websites.

As you produce your résumé in various formats, you will encounter the question of whether to include a photograph of yourself on or with your résumé. For print or electronic documents that you will be submitting to employers or job websites, the safest advice is to avoid photos. The reason is that seeing visual cues of the age, ethnicity, and gender of candidates early in the selection process exposes employers to complaints of discriminatory hiring practices. In fact, some employers won't even look at résumés that include photos, and some applicant tracking systems automatically discard résumés with any extra files.[35] However, photographs are acceptable and expected for social media résumés and other online formats where you are not actively submitting a résumé to an employer.

In addition to the six main résumé formats, some applicants create PowerPoint or Prezi presentations, videos, or infographics to supplement a conventional résumé. Two key advantages of a presentation supplement are flexibility and multimedia capabilities. For instance, you can present a menu of choices on the opening screen and allow viewers to click through to sections of interest. (Note that most of the things you can accomplish with a presentation can be done with an online résumé, which is probably more convenient for most readers.)

A video résumé can be a compelling supplement as well, but be aware that some employment law experts advise employers not to view videos, at least not until after candidates have been evaluated solely on their credentials. The reason for this caution is the same as with photographs. In addition, videos are more cumbersome to evaluate than paper or electronic résumés, and some recruiters refuse to watch them.[36] However, not all companies share this concern over videos, so you'll have to research their individual preferences. In fact, the online retailer Zappos encourages applicant videos and provides a way to upload videos on its job application webpage.[37]

An infographic résumé attempts to convey a person's career development and skill set graphically through a visual metaphor such as a timeline or subway map or as a poster with an array of individual elements. A well-designed infographic could be an intriguing element of the job-search package for candidates in certain situations and professions because it can definitely stand out from traditional résumés and can show a high level of skill in visual communication. However, infographics are likely to be incompatible with most applicant tracking systems and with the screening habits of most recruiters, so while you might stand out with an infographic, you might also get tossed out if you try to use an infographic in place of a conventional résumé. In virtually every situation, an infographic should complement a conventional résumé, not replace it. In addition, successful infographics require skills in graphical design, and if you lack those skills, you'll need to hire a designer.

### Producing a Traditional Printed Résumé

Even though most of your application activity will take place online, having a copy of a conventional printed résumé is important for taking to job fairs, interviews, and other events. Many interviewers expect you to bring a printed résumé to the interview, even if you applied online. The résumé can serve as a note-taking form or discussion guide, and it is tangible evidence of your attention to professionalism and detail.[38] When printing a résumé, choose a heavier, higher-quality paper designed specifically for résumés and other important documents. White or slightly off-white is the best color choice. Avoid papers with borders or backgrounds.

Use high-quality paper when printing your résumé.

### Printing a Scannable Résumé

You might encounter a company that prefers *scannable résumés*, a type of printed résumé that is specially formatted to be compatible with optical scanning systems that convert printed documents to electronic text. These systems were quite common just a few years ago, but their use appears to be declining rapidly as more employers prefer email delivery or website application forms.[39] A scannable résumé differs from the traditional format in two major ways: It should always include a keyword summary, and it should be formatted in a simpler fashion that avoids underlining, special characters, and other elements that can confuse the scanning system. If you need to produce a scannable résumé, search online for "formatting a scannable résumé" to get detailed instructions.

Some employers still prefer résumés in scannable format, but most now want electronic submissions.

### Creating a Plain-Text File of Your Résumé

A *plain-text file* (sometimes known as an ASCII text file) is an electronic version of your résumé that has no font formatting, no bullet symbols, no colors, no lines or boxes, and no other special formatting. The plain-text version can be used in two ways. First, you can include it in the body of an email message, for employers who want email delivery but don't want file attachments. Second, you can copy and paste the sections into the application forms on an employer's website.

A plain-text version of your résumé is simply a computer file without any of the formatting that you typically apply using word-processing software.

Make sure you verify the plain-text file that you create with your word processor; it might need a few manual adjustments using a text editor such as NotePad.

A plain-text version is easy to create with your word processor. Start with the file you used to create your résumé, use the "Save As" choice to save it as "plain text" or whichever similarly labeled option your software has, and verify the result by using a basic text editor (such as Microsoft Notepad). If necessary, reformat the page manually, moving text and inserting space as needed. For simplicity's sake, left-justify all your headings rather than trying to center them manually.

### Creating a Word File of Your Résumé

Some employers and websites want your résumé in Microsoft Word format; make sure your computer is thoroughly scanned for viruses first, however.

In some cases, an employer or job-posting website will want you to upload a Microsoft Word file or attach it to an email message. (Although there is certainly other word-processing software on the market, Microsoft Word is the de facto standard in business these days.) This method of transferring information preserves the design and layout of your résumé and saves you the trouble of creating a plain-text version. However, before you submit a Word file to anyone, make sure your computer is free of viruses. Infecting a potential employer's computer will not make a good first impression.

### Creating a PDF Version of Your Résumé

Creating a PDF file is a simple procedure, but you need the right software. Adobe Acrobat (not the free Adobe Reader) is the best-known program, but many others are available, including some free versions. You can also use Adobe's online service to create PDFs without buying software. The advantages of creating PDFs are that you preserve the formatting of your résumé (unlike pasting plain text into an email message) and you create a file type that is less vulnerable to viruses than word processer files.

### Creating an Online or Social Media Résumé

You have many options for creating an online résumé, from college-hosted e-portfolios to multimedia résumés on commercial websites.

A variety of online résumé formats, variously referred to as *e-portfolios*, *interactive résumés,* or *social media résumés*, provide the opportunity to create a dynamic, multimedia presentation of your qualifications. You can expand on the information contained in your basic résumé with links to projects, publications, screencasts, online videos, course lists, blogs, social networking profiles, and other elements that give employers a more complete picture of who you are and what you can offer (see Figure 13.6).

You have a number of options for hosting an online résumé. Start with your college's career center; many offer hosting for e-portfolios, for example, where you can showcase your academic achievements. You can also choose one of the commercial résumé hosting services, such as LinkedIn, VisualCV, and Gozaik. In addition to being free (for basic services, at least), these sites provide easy-to-use tools for creating your online profile. You can also use them to peruse examples of various résumés, from students just about to enter the workforce full-time all the way up to corporate CEOs.

Regardless of the approach you take to creating an online résumé, keep these helpful tips in mind:

- **Remember that your online presence is a career-management tool.** The way you are portrayed online can work for you or against you, and it's up to you to create a positive impression.
- **Take advantage of social networking.** Use whatever tools are available to direct people to your online résumé, such as including your URL in your Twitter profile.
- **During the application process, don't expect or ask employers to retrieve a résumé from a website.** Submit your résumé using whatever method and medium each employer prefers. If employers then want to know more about you, they will likely do a web search on you and find your site, or you can refer them to your site in your résumé or application materials.

Your résumé can't be "pretty good" or "almost perfect"—it needs to be *perfect*, so proofread it thoroughly and ask several other people to verify it, too.

## PROOFREADING YOUR RÉSUMÉ

Employers view your résumé as a concrete example of your attention to quality and detail. Your résumé doesn't need to be good or pretty good—it needs to be *perfect*. Although it

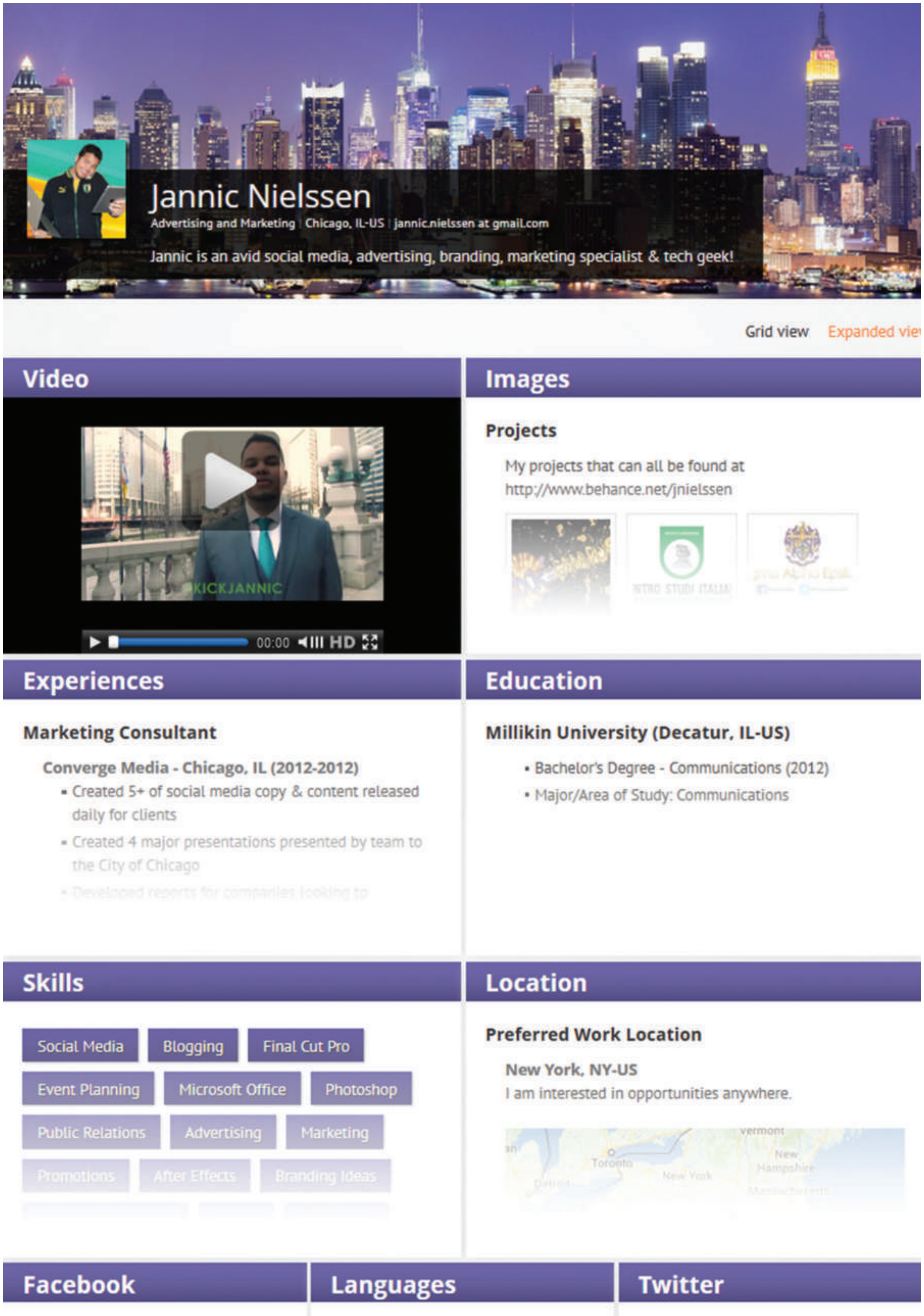


**Figure 13.6 Social Media Résumé**
Gozaik is one of several services that allow you to create and post a social media résumé.
*Source:* Reprinted by permission of Gozaik.com.

REAL-TIME UPDATES
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may not seem fair, just one or two errors in a job application package are enough to doom a candidate's chances.[40]

Your résumé is one of the most important documents you'll ever write, so don't rush or cut corners when it comes to proofreading. Check all headings and lists for clarity and parallelism, and be sure your grammar, spelling, and punctuation are correct. Double-check all dates, phone numbers, email addresses, and other essential data. Ask at least three other people to read it, too. As the creator of the material, you could stare at a mistake for weeks and not see it.

## DISTRIBUTING YOUR RÉSUMÉ

When distributing your résumé, pay close attention to the specific instructions provided by every employer, job website, or other recipient.

How you distribute your résumé depends on the number of employers you target and their preferences for receiving résumés. Employers usually list their requirements on their websites, so verify this information and follow it carefully. Beyond that, here are some general distribution tips:

- **Mailing printed résumés.** Take some care with the packaging. Spend a few extra cents to mail these documents in a flat 9 × 12 envelope, or better yet, use a Priority Mail flat-rate envelope, which gives you a sturdy cardboard mailer and faster delivery for just a few more dollars.
- **Emailing your résumé.** Some employers want applicants to include the text of their résumés in the body of an email message; others prefer an attached Microsoft Word or PDF file. If you have a reference number or a job ad number, include it in the subject line of your email message.
- **Submitting your résumé to an employer's website.** Many employers, including most large companies, now prefer or require applicants to submit their résumés online. In some instances, you will be asked to upload a complete file. In others, you will need to copy and paste sections of your résumé into individual boxes in an online application form.
- **Posting your résumé on job websites.** You can post your résumé on general-purpose job websites such as Monster and CareerBuilder, on more specialized websites such as Jobster or Jobfox, or with staffing services such as Volt. Roughly 100,000 job boards are now online, so you'll need to spend some time looking for sites that specialize in your target industries, regions, or professions.[41] Before you upload your résumé to any site, however, learn about its privacy protection. Some sites allow you to specify levels of confidentiality, such as letting employers search your qualifications without seeing your personal contact information or preventing your current employer from seeing your résumé. Don't post your résumé to any website that doesn't give you the option of restricting the display of your contact information. Only employers that are registered clients of the service should be able to see your contact information.[42]

Don't post a résumé on any public website unless you understand its privacy and security policies.

For the latest information on résumé writing and distribution, visit **http://real-timeupdates.com/bce7** and click on Chapter 13.

# Chapter Review and Activities

## Learning Objectives: Check Your Progress

**Objective 1: List eight key steps to finding the ideal opportunity in today's job market.**

The eight steps discussed in this chapter are (1) writing the story of you, which involves describing where you have been in your career so far and where you would like to go in the future; (2) learning to think like an employer so you can present yourself as a quality hire; (3) researching industries and companies of interest to identify promising opportunities and to learn the language of the hiring managers; (4) translating your general potential into a specific solution for each employer so that you look like a good fit for each opening; (5) taking the initiative to approach interesting companies even if they haven't yet posted any job openings; (6) building your network so you and your connections can help each other in the job search process; (7) seeking career counseling if appropriate; and (8) avoiding the easily avoidable mistakes that can ruin your chances of getting a job.

**Objective 2: Explain the process of planning your résumé, including how to choose the best résumé organization.**

Planning a résumé starts with recognizing what it is: a persuasive message designed to get you job interviews. Gathering the necessary information involves learning about target industries, professions, companies, and specific positions, as well as gathering information about yourself. Choosing the best résumé organization depends on your background and your goals. A chronological résumé helps employers easily locate necessary information, highlights your professional growth and career progress, and emphasizes continuity and stability. If you can use the chronological format, you should because it is the approach employers tend to prefer. A functional résumé helps employers easily see what you can do for them, allows you to emphasize earlier job experience, and lets you downplay any lengthy periods of unemployment or a lack of career progress. However, many employers are suspicious of functional résumés for this very reason. The combination approach uses the best features of the other two and is often the best choice for recent graduates.

**Objective 3: Describe the tasks involved in writing your résumé, and list the sections to consider including in your résumé.**

Adapting to the audience is crucial, because readers are looking to see how well you understand their businesses and can present a solution to their talent needs. The major sections to consider including in your résumé are (1) your name and contact information; (2) an introductory statement, which can be a career objective, a qualifications summary, or a career summary; (3) your education; (4) your work experience; and (5) activities and achievements that are professionally relevant. Most résumés do not need to include any personal data.

**Objective 4: Characterize the completing step for résumés, including the six most common formats in which you can produce a résumé.**

Quality is paramount with résumés, so the tasks of revising and proofing are particularly important. The six common résumé formats are traditional printed résumé, scannable résumé, electronic plain-text file, Microsoft Word file, PDF, and online résumé (which might be called a personal webpage, an e-portfolio, or a social media résumé).

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>
> Go to **mybcommlab.com** to complete the problems marked with this icon ★.

## Test Your Knowledge

To review chapter content related to each question, refer to the indicated Learning Objective.

★ **13-1.** Why is networking an essential part of your lifelong career planning? [LO-1]

**13-2.** Name some common facts and fallacies about résumés. [LO-2]

★ **13-3.** Why do most employers prefer chronological résumés over functional résumés? [LO-2]

**13-4.** Why is it important to find and use relevant keywords in your résumé? [LO-3]

## Apply Your Knowledge

To review chapter content related to each question, refer to the indicated Learning Objective.

★ **13-5.** If you were a team leader at a summer camp for children with special needs, should you include this in your employment history if you are applying for work that is unrelated? Explain your answer. [LO-3]

**13-6.** Suppose you've taken a year's break midway through your career to pursue social work. How would you mention this in your résumé? [LO-3]

★ **13-7.** If you are a corporate communications manager looking to leverage your skills for a position in internal communications, how would you state your career objective? [LO-3]

★ **13-8.** You've been a successful public relations manager with two consultancies for the last 10 years. Unfortunately, due to health reasons, you had to take a break to recover. During this time, you were able to manage a few part-time assignments providing content for an e-commerce company that was totally unrelated to your career profile. Now that you have recovered and are actively seeking opportunities in public relations, how would you explain the year's gap in your résumé? Do you think it would be better to cite your health issues and garner sympathy from prospective employers or fudge some details, hoping it would go unnoticed? Would you choose between a good career objective or a good career summary to impress prospective employers with your earlier assignments? [LO-3]

## Practice Your Skills

### Activities

Each activity is labeled according to the primary skill or skills you will need to use. To review relevant chapter content, you can refer to the indicated Learning Objective. In some instances, supporting information will be found in another chapter, as indicated.

**13-9. Career Management: Researching Career Opportunities [LO-1]** Based on the preferences you identified in the self-assessment in the Prologue (see page 37) and the academic, professional, and personal qualities you have to offer, perform an online search for a career opportunity that matches your interests and qualifications (starting with any of the websites listed in Table 13.1). Draft a one-page report indicating how the career you select and the job openings you find match your strengths and preferences.

**13-10. Message Strategies: Planning a Résumé [LO-2]** A friend has requested you to redesign his résumé after repeatedly failing to secure a job. He has extensive experience as an electronics engineer with impressive academic qualifications. However, due to frequent career switches, his résumé appears unattractive. Would you suggest a chronological or a functional résumé? Explain how you would design it.

**13-11. Message Strategies: Writing a Résumé [LO-3]** Rewrite this résumé so that it follows the guidelines presented in this chapter.

Sylvia Manchester
765 Belle Fleur Blvd.
New Orleans, LA 70113
(504) 312-9504
smanchester@rcnmail.com

PERSONAL: Single, excellent health, 5'7", 136 lbs.; hobbies include cooking, dancing, and reading.

JOB OBJECTIVE: To obtain a responsible position in marketing or sales with a good company.

EDUCATION: BA degree in biology, University of Louisiana, 1998. Graduated with a 3.0 average. Member of the varsity cheerleading squad. President of Panhellenic League. Homecoming queen.

WORK EXPERIENCE

Fisher Scientific Instruments, 2014 to now, field sales representative. Responsible for calling on customers and explaining the features of Fisher's line of laboratory instruments. Also responsible for writing sales letters, attending trade shows, and preparing weekly sales reports.

Fisher Scientific Instruments, 2011–2013, customer service representative. Was responsible for handling incoming phone calls from customers who had questions about delivery, quality, or operation of Fisher's line of laboratory instruments. Also handled miscellaneous correspondence with customers.

Medical Electronics, Inc., 2008–2011, administrative assistant to the vice president of marketing. In addition to handling typical secretarial chores for the vice president of marketing, I was in charge of compiling the monthly sales reports, using figures provided by members of the field sales force. I also was given responsibility for doing various market research activities.

New Orleans Convention and Visitors Bureau, 2005–2008, summers, tour guide. During the summers of my college years, I led tours of New Orleans for tourists visiting the city. My duties included greeting conventioneers and their spouses at hotels, explaining the history and features of the city during an all-day sightseeing tour, and answering questions about New Orleans and its attractions. During my fourth summer with the bureau, I was asked to help train the new tour guides. I prepared a handbook that provided interesting facts about the various tourist attractions, as well as answers to the most commonly asked tourist questions. The Bureau was so impressed with the handbook they had it printed up so that it could be given as a gift to visitors.

University of Louisiana, 2005–2008, part-time clerk in admissions office. While I was a student in college, I worked 15 hours a week in the admissions office. My duties included filing, processing applications, and handling correspondence with high school students and administrators.

**13-12. Message Strategies: Writing a Résumé; Collaboration: Team Projects [LO-3], Chapter 2** Working with another student, change the following statements to make them more effective for a résumé by using action verbs and concrete keywords.

- **a.** Have some experience with database design.
- **b.** Assigned to a project to analyze the cost accounting methods for a large manufacturer.
- **c.** I was part of a team that developed a new inventory control system.
- **d.** Am responsible for preparing the quarterly department budget.
- **e.** Was a manager of a department with seven employees working for me.
- **f.** Was responsible for developing a spreadsheet to analyze monthly sales by department.
- **g.** Put in place a new program for ordering supplies.

**13-13. Message Strategies: Writing a Résumé [LO-3]** Using your team's answers to Activity 13.12, make the statements stronger by quantifying them (make up any numbers you need).

**13-14. Message Strategies: Writing a Résumé; Communication Ethics: Resolving Ethical Dilemmas [LO-3], Chapter 1** Assume that you achieved all the tasks shown in Activity 13.12 not as an individual employee, but as part of a work team. In your résumé, must you mention other team members? Explain your answer.

## Expand Your Skills

### Critique the Professionals

Locate an example of an online résumé (a sample or an actual résumé). Analyze the résumé following the guidelines presented in this chapter. Using whatever medium your instructor requests, write a brief analysis (no more than one page) of the résumé's strengths and weaknesses, citing specific elements from the résumé and support from the chapter. If you are analyzing a real résumé, do not include any personally identifiable data, such as the person's name, email address, or phone number, in your report.

### Sharpen Your Career Skills Online

Bovée and Thill's Business Communication Web Search, at **http://websearch.businesscommunicationnetwork.com**, is a unique research tool designed specifically for business communication research. Use the Web Search function to find a website, video, PDF document, podcast, or presentation that offers advice on creating effective online résumés. Write a brief email message to your instructor or a post for your class blog, describing the item that you found and summarizing the career skills information you learned from it.

# Cases

Website links for selected companies mentioned in cases can be found in the Student Assignments section at http://real-timeupdates.com/bce7.

## CAREER SKILLS/ EMAIL SKILLS

**13-15. Career Planning: Researching Career Opportunities [LO-1]** Knowing the jargon and "hot-button" issues in a particular profession or industry can give you a big advantage when it comes to writing your résumé and participating in job interviews. You can fine-tune your résumé for both human readers and applicant tracking systems, sound more confident and informed in interviews, and present yourself as a professional-class individual with an inquiring mind.

**Your task:** Imagine a specific job category in a company that has an informative, comprehensive website (to facilitate the research you'll need to do). This doesn't have to be a current job opening, but a position you know exists or is likely to exist in this company, such as a business systems analyst at Apple or a brand manager at Unilever.

Explore the company's website and other online sources to find the following: (1) a brief description of what this job entails, with enough detail so that you could describe it to a fellow student; (2) some of the terminology used in the profession or industry, both formal terms that might serve as keywords on your résumé and informal terms and phrases that insiders are likely to use in publications and conversations; (3) an ongoing online conversation among people in this profession, such as a LinkedIn Group, a popular industry or professional blog that seems to get quite a few comments, or an industry or professional publication that attracts a lot of comments; and (4) at least one significant issue that will affect people in this profession or companies in this industry over the next few years. For example, if your chosen profession involves accounting in a publicly traded corporation, upcoming changes in international financial reporting standards would be a significant issue. Similarly, for a company in the consumer electronics industry, the recycling and disposal of *e-waste* is an issue. Write a brief email message summarizing your findings and explaining how you could use this information on your résumé and during job interviews.

## CAREER SKILLS/EMAIL SKILLS

**13-16. Career Management: Researching Career Opportunities [LO-1]** Perhaps you won't be able to land your ultimate dream job right out of college, but that doesn't mean you shouldn't start planning right now to make that dream come true.

**Your task:** Using online job search tools, find a job that sounds just about perfect for you, even if you're not yet qualified for it. It might even be something that would take 10 or 20 years to reach. Don't settle for something that's not quite right—find a job that is so "you" and so exciting that you would jump out of bed every morning, eager to go to work (such jobs really do exist!). Start with the job description you found online and then supplement it with additional research so that you get a good picture of what this job and career path are all about. Compile a list of all the qualifications you would need in order to have a reasonable chance of landing such a job. Now compare this list with your current résumé. Write a brief email message to your instructor that identifies all the areas in which you would need to improve your skills, work experience, education, and other qualifications in order to land your dream job.

## CAREER SKILLS/TEAM SKILLS

**13-17. Planning a Résumé [LO-2]** If you haven't begun your professional career yet or you are pursuing a career change, the employment history section on your résumé can sometimes be a challenge to write. A brainstorming session with your wise and creative classmates could help.

**Your task:** In a team assigned by your instructor, help each other evaluate your employment histories and figure out the best way to present your work backgrounds on a résumé. First, each member of the team should compile his or her work history, including freelance projects and volunteer work if relevant, and share this information with the team. After allowing some time for everyone to review each other's information, meet as a team (in person if you can, or online otherwise). Discuss each person's history, pointing out strong spots and weak spots, and then brainstorm the best way to present each person's employment history.

Note: If there are aspects of your employment history you would rather not share with your teammates, substitute a reasonably similar experience of the same duration.

## CAREER SKILLS/TEAM SKILLS

**13-18. Writing a Résumé [LO-3]** The introductory statement of a résumé requires some careful thought, both in deciding which of the three types of introductory statement (see page 394) to use and what information to include in it. Getting another person's perspective on this communication challenge can be helpful. In this activity, in fact, someone else is going to write your introductory statement for you, and you will return the favor.

**Your task:** Pair off with a classmate. Provide each other with the basic facts about your qualifications, work history, education, and career objectives. Then meet in person or online for an informal interview, in which you ask each other questions to flesh out the information you have on each other. Assume that each of you has chosen to use a qualifications summary for your résumé. Now write each other's qualifications summary and then trade them for review. As you read what your partner wrote about you, ask yourself if this feels true to what you believe about yourself and your career aspirations. Do you think it introduces you effectively to potential employers? What might you change about it?

## PRESENTATION SKILLS/PORTFOLIO BUILDER

**13-19. Message Strategies: Completing a Résumé [LO-4]** Creating presentations and other multimedia supplements can be a great way to expand on the brief overview that a résumé provides.

**Your task:** Starting with any version of a résumé you've created for yourself, create a PowerPoint presentation that expands on your résumé information to give potential employers a more complete picture of what you can contribute. Include samples of your work, testimonials from current or past employers and colleagues, videos of speeches you've made, and anything else that tells the story of the professional "you." If you have a specific job or type of job in mind, focus your presentation on that. Otherwise, present a more general picture that shows why you would be a great employee for any company to consider. Be sure to review the information from Chapter 12 about creating professional-quality presentations.

### CAREER SKILLS/VIDEO SKILLS

**13-20. Message Strategies: Completing a Résumé [LO-4]** In the right circumstances, brief videos can be an effective complement to a traditional job-search communication package.

**Your task:** Find a job opening that interests you (something you are at least partially qualified for at this stage of your career) and produce a two-minute video profile of yourself, highlighting the skills mentioned in the job description. For tips on producing effective video, visit the Indie Filmmaking website.

## Improve Your Grammar, Mechanics, and Usage

You can download the text of this assignment from http://real-timeupdates.com/bce7; click on Student Assignments and then click on Chapter 13. Improve Your Grammar, Mechanics, and Usage.

### Level 1: Self-Assessment—Numbers

Review Section 3.4 in the Handbook of Grammar, Mechanics, and Usage. For the following items, correct number styles wherever necessary.

**13-21.** We need to hire one office manager, four accountants, and twelve programmer-analysts.
**13-22.** The market for this product is nearly six million people in our region alone.
**13-23.** Make sure that all 1835 pages are on my desk no later than nine o'clock a.m.
**13-24.** 2004 was the year that José Guiterez sold more than $50 thousand dollars worth of stock.
**13-25.** Our deadline is 4/7, but we won't be ready before 4/11.
**13-26.** 95 percent of our customers are men.
**13-27.** More than 1/2 the U.S. population is female.
**13-28.** Cecile Simmons, thirty-eight, is the first woman in this company to be promoted to management.
**13-29.** Last year, I wrote 20 15-page reports, and Michelle wrote 24 three-page reports.
**13-30.** Of the 15 applicants, seven are qualified.
**13-31.** Our blinds should measure 38 inches wide by 64 and one-half inches long by 7/16 inches deep.
**13-32.** Deliver the couch to seven eighty-three Fountain Rd., Suite three, Procter Valley, CA 92074.
**13-33.** Here are the corrected figures: 42.7% agree, 23.25% disagree, 34% are undecided, and the error is .05%
**13-34.** You have to agree that 50,000,000 U.S. citizens cannot be wrong.
**13-35.** We need a set of shelves 10 feet, eight inches long.

### Level 2: Workplace Applications

The following items may contain errors in grammar, capitalization, punctuation, abbreviation, number style, word division, and vocabulary. Rewrite each sentence, correcting all errors. If a sentence has no errors, write "Correct" for that number.

**13-36.** Speaking at a recent software conference Alan Nichols; ceo of Tekco Systems; said the companys' goal is to reduce response time to 2 to 4 hrs., using software as an enabler.
**13-37.** Selling stocks short are the latest rage on wall street, where lately things have just gone from bad to worst.
**13-38.** As Electronic Commerce grows people are trying to find new ways to make money off of it.
**13-39.** We give a notification not only to the customer but also our salespeople that the product has been shipped because they will want to follow up.
**13-40.** When deciding between these various suppliers, we found that each of them offer both advantages and also disadvantages.
**13-41.** I found the book, "Marketing is Easy, Selling is Hard," for three different prices on the Internet: $14, $13.25, and $12.00.
**13-42.** United Agra Products, a distributor of fertilizers and seeds, in transmission of customer orders over it's private network faced the possibility of serious bottlenecks.
**13-43.** The answers you receive on your questionnaire, are influenced by the types of question you ask, the way they are asked, and your subjects cultural and language background.
**13-44.** The creation of hazardous by products, like silver in film processing, require us to collect our used chemicals for disposal at a hazardous-waste-facility.
**13-45.** As a source of ingredients for our products, we try to establish relationships with small cooperative or farming communities often in developing countries–because, we believe that the best way to improve peoples' lives is to give them a chance at self reliance.
**13-46.** A entrepreneur really should never be in any organization that get's so big that it looses intimacy.
**13-47.** Racecar Driver Eddie Cheever, is founder of Aleanza Marketing Group, a seven-person company that handles $10 million dollars in sponsorship campaigns for Cheevers' team Red Bull Cheever Racing.
**13-48.** Over the last six years, Business Cluster Development have started 13 technology related incubators, that they call 'business clusters.'
**13-49.** In an interview, Gary Hoover said "When I dreamed up Bookstop, we asked people, 'If there was a bookstore that carried a huge selection of books and had them all at discount prices, would you go there?' and we got a lot of yawns".
**13-50.** The chief attraction of vending machines are their convenience, they are open 24 hours a day, on the other hand, vending machine prices are no bargain.

### Level 3: Document Critique

The following document may contain errors in grammar, capitalization, punctuation, abbreviation, number style, word division, and vocabulary. As your instructor indicates, photocopy this page and correct all errors using standard proofreading marks (see Appendix C) or download the document and make the corrections in your word processing software.

The Executive Summary (excerpt)

Purpose of the Proposal

This document will acquaint the reader with 3 principle topics by

- Showing what the San Diego State University (SDSU) Suntrakker project is;
- Showing that the team-oriented, inerdepartmental diciplines at SDSU possesses the tenacity and knowhow to build and race a solar-powered vehical in the World solar Challenge Race in Austrailia next year;
- Define and articulate how this business team expect to promote and generate the neccesary support; funds, and materials from the student body, alumni, community and local businesses to sieze and executive this opportunity.

### Project Profile

The Suntrakker Solar Car project was conceived by a small group of San Diego State university engineering students motivated by the successof of the General motors "Sunrayce," committed itself to designing and building a superior solar-powered vehicle to compete in the world Solar Challenge.

From modest Beginnings, the Suntrakker project quickly revolved into a cross-disciplinary educational effort encompassing students from many colleges of San Diego State University. The project has provides students participants and volunteers with valuable real life experiences and has brought them together in an effort that benefits not only the students and the university but also the environment.

Sponsors of this project are not only contributing to the successful achievment of the overall Suntrakker project but will also enhance their goodwill, advertising, and name promotion by association with the project. In addition, the Suntrakker offers a unique opportunity for the companies who can donate parts and accessories to showcase their name and test field their products in public in this highly publicized international contest.

MyBCommLab

Go to **mybcommlab.com** for the following Assisted-graded writing questions:

**13-51.** How can you "think like an employer" if you have no professional business experience? [LO-1]

**13-52.** What are the advantages of an online/social media résumé? [LO-4]

## Endnotes

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# 14 Applying and Interviewing for Employment

## LEARNING OBJECTIVES

After studying this chapter, you will be able to

1. Explain the purposes of application letters, and describe how to apply the AIDA organizational approach to them
2. Describe the typical sequence of job interviews, the major types of interviews, and the attributes employers look for during an interview
3. List six tasks you need to complete to prepare for a successful job interview
4. Explain how to succeed in all three stages of an interview
5. Identify the most common employment messages that follow an interview, and explain when you would use each one



## Communication Matters . . .

"Most people in an interview don't make explicit their thought process behind how or why they did something and, even if they are able to come up with a compelling story, they are unable to explain their thought process."
—Laszlo Bock, senior vice president of people operations, Google[1]

Google is known for its rigorous job interviews. Hiring managers put a high priority on cognitive ability, so they want to know how candidates think and why they make the choices they make. Even if you have no plans to interview at Google or any other high-tech company, take Bock's advice and apply it to your own interview strategy. Be ready with compelling reasons that explain your skills, accomplishments, and major life and career decisions—you'll be sure to impress smart interviewers at any company.

This chapter will give you a foundation for successful interviewing, along with tips on writing effective application letters and other important employment-related messages.

Paul Vasarhelyi/Alamy

Google's Laszlo Bock emphasizes how important it is to explain *how* and *why* you accomplished things in school and at work, not merely that you did accomplish something.

# Submitting Your Résumé

1 LEARNING OBJECTIVE
Explain the purposes of application letters, and describe how to apply the AIDA organizational approach to them.

Your résumé (see Chapter 13) is the centerpiece of your job-search package, but it needs support from several other employment messages, including application letters, job-inquiry letters, application forms, and follow-up notes.

## WRITING APPLICATION LETTERS

Always accompany your résumé with an application letter (printed or email) that motivates the recipient to read the résumé.

Whenever you mail, email, hand-deliver, or upload your résumé, you should include an **application letter**, also known as a *cover letter*, to let readers know what you're sending, why you're sending it, and how they can benefit from reading it. (Even though this message is often not a printed letter anymore, many professionals still refer to it as a letter.) Take the same care with your application letter that you took with your résumé. A poorly written application letter can prompt employers to skip over your résumé, even if you are a good fit for a job.[2] Staffing specialist Abby Kohut calls the application letter "a writing-skills evaluation in disguise" and emphasizes that even a single error can get you bounced from contention.[3]

As with proposals, the best approach for an application letter depends on whether your application is solicited or unsolicited.

The best approach for an application letter depends on whether you are applying for an identified job opening or are *prospecting*—taking the initiative to write to companies even though they haven't announced a job opening that is right for you.[4] In many ways, the difference between the two is like the difference between solicited and unsolicited proposals (see page 296). Figure 14.1 shows an application message written in response to a posted job opening. The writer knows exactly what qualifications the organization is seeking and can "echo" those attributes back in his letter.

Writing a prospecting letter is more challenging because you don't have the clear target you have with a solicited letter, and the message is unexpected. You will need to do more research to identify the qualities that a company would probably seek for the position you hope to occupy (see Figure 14.2 on page 414). Also, search for news items that involve the company, its customers, the profession, or the individual manager to whom you are writing. Using this information in your application letter helps you establish common ground with your reader—and it shows that you are tuned in to what is going on in the industry.

For either type of letter, follow these tips to be more effective:[5]

- If the name of an individual manager is findable, address your letter to that person. (And if it is findable, make sure you find it, because other applicants will.) Search LinkedIn, the company's website, industry directories, Twitter, and anything else you can think of to locate an appropriate name. Ask the people in your network if they know a name. If you can't find a name, addressing your letter to "Dear Hiring Manager" is perfectly acceptable.
- Clearly identify the opportunity you are applying for or expressing interest in.
- Show that you understand the company and its marketplace.
- Never volunteer salary history or requirements unless an employer has asked for this information.
- Keep it short—no more than three or four brief paragraphs. Remember that all you are trying to do at this point is move the conversation forward one step.
- Show some personality, while maintaining a business-appropriate tone. The letter gives you the opportunity to balance the facts-only tone of your résumé.
- Project confidence without being arrogant.
- Don't just repeat information from your résumé; use the conversational tone of the letter to convey additional professional and personal qualities and your reasons for wanting this particular job.

Because application letters are persuasive messages, the AIDA approach you learned in Chapter 9 is ideal, as the following sections explain.

### Getting Attention

The opening paragraph of your application letter needs to clearly convey the reason you're writing and give the recipient a compelling reason to keep reading.

The opening paragraph of your application letter must accomplish two essential tasks: (1) explaining why you are writing and (2) giving the recipient a reason to keep reading by

| Position | | | Supply Chain Pricing Analyst Apply | | |
|---|---|---|---|---|---|
| Position code | T23-6678 | Location | Tacoma, WA | Status | Full-time |

Sea-Air Global Transport has an immediate opening for a supply chain pricing analyst in our Tacoma, WA, headquarters. This challenging position requires excellent communication skills in a variety of media, a polished customer service presence both in person and over the phone, and proven aptitude in statistical analysis and business mathematics.

The minimum educational requirement for this position is a bachelors degree or equivalent, preferably in business, statistical methods, or applied mathematics. Experience in customer service is highly desirable, and experience in transportation or logistics is a major plus.

Click here to learn more about Sea-Air or click here to explore the attractive compensation and benefits packages we offer all employees.

Smith's application letter echoes the language of the job posting.

27225 Eucalyptus Avenue
Long Beach, CA 90806
March 13, 2016

Sea-Air Global Transport
5467 Port of Tacoma Rd., Suite 230
Tacoma, WA 98421

Dear Hiring Manager:

The first sentence grabs attention by indicating knowledge of the company and its industry.

Sea-Air Global Transport consistently appeared as a top transportation firm in the research I did for my senior project in global supply chain management, so imagine my delight when I discovered the opening for an export pricing analyst in your Tacoma headquarters (Position Code: T23-6678). With a major in business and a minor in statistical methods, my education has been ideal preparation for the challenges of this position.

The opening paragraph identifies the specific job for which he is applying.

In fact, my senior project demonstrates most of the skills listed in your job description, including written communication skills, analytical abilities, and math aptitude. I enjoyed the opportunity to put my math skills to the test as part of the statistical comparison of various freight modes.

In this discussion of his skills, he echoes the qualifications stated in the job posting.

The reference to his résumé emphasizes his customer service orientation and also shows he has done his homework by researching the company.

As you can see from my résumé, I also have more than three years of part-time experience working with customers in both retail and commercial settings. This experience taught me the importance of customer service, and I want to start my professional career with a company that truly values the customer. In reviewing your website and reading several articles on Lloyd's List and other trade websites, I am impressed by Sea-Air's constant attention to customer service in this highly competitive industry.

In the close, he politely asks for an interview in a way that emphasizes yet another job-related skill.

My verbal communication skills would be best demonstrated in an interview, of course. I would be happy to meet with a representative of your company at their earliest convenience. I can be reached at dalton.k.smith@gmail.com or by phone at (562) 555-3737.

The letter doesn't include a handwritten signature because it was uploaded to a website along with his résumé.

Sincerely,

Dalton Smith

**Figure 14.1 Solicited Application Message**
In this response to an online job posting, Dalton Smith highlights his qualifications while mirroring the requirements specified in the posting. Following the AIDA model, he grabs attention immediately by letting the reader know he is familiar with the company and the global transportation business.

demonstrating that you have some immediate potential for meeting the company's needs. Consider this opening:

> With the recent slowdown in corporate purchasing, I can certainly appreciate the challenge of new fleet sales in this business environment. With my high energy level and 16 months of new-car sales experience, I believe I can produce the results you listed as vital in the job posting on your website.

**Poor**

457 Mountain View Rd.
Clear Lake, IA 50428
June 16, 2015

Ms. Patricia Downing, Store Manager
Walmart
840 South Oak
Iowa Falls, IA 50126

Dear Ms. Downing:

Do you have any openings for people who want to move into store management? I am really looking for an opportunity to get a job like yours, even if it takes starting at a low level and working my way up.

The writer commits three major mistakes in the first paragraph: asking a question that she could answer herself by visiting the company's website, failing to demonstrate any knowledge of the company, and making the message all about her.

Allow me to list some highlights from my enclosed résumé. First, I have a BA degree in retailing, which included such key courses as retailing, marketing, management, and business information systems. Second, I have worked as a clerk and as an assistant manager in a large department store. Third, I have experience in the customer-facing aspect of retailing, as well as operations, marketing, and personnel supervision.

This paragraph merely repeats information from the enclosed résumé, which wastes the reader's time and wastes the opportunity for the writer to present a more complete picture of herself.

Successful retailing is about more than systems and procedures. It is also about anticipating customer needs, fostering positive relationships with the community, and delivering the type of service that keeps customers coming back. Retailers that fail in any of these areas are doomed to decline in today's hypercompetitive sales environment. I am the sort of forward-thinking, customer-focused leader who can help you avoid this fate.

Johns attempts to show that she understands retailing, but this paragraph comes across as an arrogant lecture. The tone is particularly inappropriate, given that she is writing to the store's top manager.

I will call you next Wednesday at 2:00 to explain why I would make a great addition to your team.

The call to action is overly aggressive, and it presumes that the reader will be available and willing to take a phone call from a complete stranger about a job opening that might not even exist.

Sincerely,

Glenda Johns

Glenda Johns
Enclosure

**Improved**

457 Mountain View Rd.
Clear Lake, IA 50428
June 16, 2015

Ms. Patricia Downing, Store Manager
Walmart
840 South Oak
Iowa Falls, IA 50126

Dear Ms. Downing:

Johns gets the reader's attention by demonstrating good awareness of the company and the type of people it hires, presents herself as just such a professional, and then asks to be considered for any relevant job openings.

Even with its world-class supply chain, admired brand name, and competitive prices, Walmart obviously would not be the success it is without enthusiastic, service-driven associates and managers. If you have or foresee an opening for such a professional, someone eager to learn the Walmart way and eventually move into a management position, please consider me for the opportunity.

As an associate or management trainee, I can bring a passion for retailing and the perspective I've gained through academic preparation and four years of experience. (Please refer to my enclosed résumé for more information.)

Johns uses the body of her letter to expand on the information presented in her résumé, rather than simply repeating that information.

Working as a clerk and then as an assistant manager in a large department store taught me how to anticipate customer needs, create effective merchandising, and deliver service that keeps customers coming back. Moreover, my recent BA degree in retailing, which encompassed such courses as retailing concepts, marketing fundamentals, management, and business information systems, prepared me with in-depth awareness of contemporary retailing issues and strategies.

The close builds the reader's interest by demonstrating knowledge of the company's policy regarding promotion.

The call to action is respectful, and it makes a response easy for the reader by providing both phone and email contact information.

I understand Walmart prefers to promote its managers from within, and I would be pleased to start out with an entry-level position until I gain the necessary experience. Could we have a brief conversation about the possibilities of joining your team? I am available by phone at 641-747-2222 or email at glendajohns@mailnet.com.

Sincerely,

Glenda Johns

Glenda Johns
Enclosure

**Figure 14.2 Unsolicited Application Letter: Poor and Improved**
Demonstrating knowledge of the employer's needs and presenting your qualifications accordingly are essential steps in an unsolicited application letter.

**TABLE 14.1 Tips for Getting Attention in Application Letters**

| Tip | Example |
|---|---|
| **Unsolicited Application Letters** | |
| Show how your strongest skills will benefit the organization. | If you need a regional sales specialist who consistently meets sales targets while fostering strong customer relationships, please consider my qualifications. |
| Describe your understanding of the job's requirements, and show how well your qualifications fit them. | Your annual report stated that improving manufacturing efficiency is one of the company's top priorities for next year. Through my postgraduate research in systems engineering and consulting work for several companies in the industry, I've developed reliable methods for quickly identifying ways to cut production time while reducing resource use. |
| Mention the name of a person known to and highly regarded by the reader. | When Janice McHugh of your franchise sales division spoke to our business communication class last week, she said you often need promising new marketing graduates at this time of year. |
| Refer to publicized company activities, achievements, changes, or new procedures. | Today's issue of the *Detroit News* reports that you may need the expertise of computer programmers versed in robotics when your Lansing tire plant automates this spring. |
| Use a question to demonstrate your understanding of the organization's needs. | Can your fast-growing market research division use an interviewer with two years of field survey experience, a B.A. in public relations, and a real desire to succeed? If so, please consider me for the position. |
| Use a catchphrase opening if the job requires ingenuity and imagination. | *Haut monde*—whether referring to French, Italian, or Arab clients, it still means "high society." As an interior designer for your Beverly Hills showroom, not only could I serve and sell to your distinguished clientele but I could do it in all these languages. I speak, read, and write them fluently. |
| **Solicited Application Letters** | |
| Identify where you discovered the job opening; describe what you have to offer. | Your job posting on Monster.com for a cruise-line social director caught my eye. My eight years of experience as a social director in the travel industry would equip me to serve your new Caribbean cruise division well. |

This applicant does a smooth job of echoing the company's stated needs while highlighting his personal qualifications and providing evidence that he understands the broader market. He balances his relative lack of experience with enthusiasm and knowledge of the industry. Table 14.1 suggests some other ways you can spark interest and grab attention in your opening paragraph.

## Building Interest and Increasing Desire

The middle section of your letter presents your strongest selling points in terms of their potential benefit to the organization, thereby building interest in you and creating a desire to interview you. Be specific and back up your assertions with convincing evidence:

Use the middle section of your application letter to expand on your opening and present a more complete picture of your strengths.

**Poor:** I completed three college courses in business communication, earning an A in each course, and have worked for the past year at Imperial Construction.
**Improved:** Using the skills gained from three semesters of college training in business communication, I developed a collection system for Imperial Construction that reduced annual bad-debt losses by 25 percent.

In a solicited letter, be sure to discuss each major requirement listed in the job posting. If you are deficient in any of these requirements, stress other solid selling points to help strengthen your overall presentation. Don't restrict your message to just core job duties, either. Also highlight personal characteristics that apply to the targeted position, such as your ability to work hard or handle responsibility:

While attending college full-time, I worked part-time during the school year and up to 60 hours a week each summer in order to be totally self-supporting while in college. I can offer your organization the same level of effort and perseverance.

Don't bring up salary in your application letter unless the recipient has asked you to include your salary requirements.

Mention your salary requirements only if the organization has asked you to state them. If you don't know the salary that's appropriate for the position and someone with your qualifications, you can find typical salary ranges at the Bureau of Labor Statistics website, or a number of commercial websites. If you do state a target salary, tie it to the value you would offer:

> For the past two years, I have been helping a company similar to yours organize its database marketing efforts. I would therefore like to receive a salary in the same range (the mid-60s) for helping your company set up a more efficient customer database.

Toward the end of this section, refer the reader to your résumé by citing a specific fact or general point covered there:

> As you can see in the attached résumé, I've been working part-time with a local publisher since my sophomore year. During that time, I've used client interactions as an opportunity to build strong customer-service skills.

### Motivating Action

In the final paragraph of your application letter, respectfully ask for specific action and make it easy for the reader to respond.

The final paragraph of your application letter has two important functions: to ask the reader for a specific action (usually an interview) and to facilitate a reply. Offer to come to the employer's office at a convenient time or, if the firm is some distance away, to meet with its nearest representative or arrange a telephone or Skype interview. Include your email address and phone number, as well as the best times to reach you:

> After you have reviewed my qualifications, could we discuss the possibility of putting my marketing skills to work for your company? I am available at (360) 555-7845 from 2 p.m. to 10 p.m. Monday to Friday or by email at john.wagner462@gmail.com.

## FOLLOWING UP AFTER SUBMITTING A RÉSUMÉ

Think creatively about a follow-up letter; show that you've continued to add to your skills or that you've learned more about the company or the industry.

Deciding if, when, and how to follow up after submitting your résumé and application letter is one of the trickiest parts of a job search. First and foremost, keep in mind that employers continue to evaluate your communication efforts and professionalism during this phase, so don't say or do anything to leave a negative impression. Second, adhere to whatever instructions the employer has provided. If a job posting says "no calls," for example, don't call. Third, if the job posting lists a *close date*, don't call or write before then, because the company is still collecting applications and will not have made a decision about inviting people for interviews. Wait a week or so after the close date. If no close date is given and you have no other information to suggest a time line, you can generally contact the company starting a week or two after submitting your résumé.[6]

When you follow up by email or telephone, you can share an additional piece of information that links your qualifications to the position (keep an eye out for late-breaking news about the company, too) and ask a question about the hiring process as a way to gather some information about your status. Good questions to ask include:[7]

- Has a hiring decision been made yet?
- Can you tell me what to expect next in terms of the hiring process?
- What is the company's time frame for filling this position?
- Could I follow up in another week if you haven't had the chance to contact me yet?
- Can I provide any additional information regarding my qualifications for the position?

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**How much are you worth?**

Find real-life salary ranges for a wide range of jobs. Go to **http://real-timeupdates.com/bce7**. Under "Students," click on "Learn More."

Whatever the circumstances, a follow-up message can demonstrate that you're sincerely interested in working for the organization, persistent in pursuing your goals, and committed to upgrading your skills.

If you don't land a job at your dream company on the first attempt, don't give up. You can apply again if a new opening appears, or you can send an updated résumé with a new unsolicited application letter that describes how you have gained additional experience, taken a relevant course, or otherwise improved your skill set. Many leading employers take note of applicants who came close but didn't quite make it and may extend offers when positions open up in the future.[8]

# Understanding the Interviewing Process

**2 LEARNING OBJECTIVE** Describe the typical sequence of job interviews, the major types of interviews, and the attributes employers look for during an interview.

An **employment interview** is a meeting during which both you and the prospective employer ask questions and exchange information. The employer's objective is to find the best talent to fill available job openings, and your objective is to find the right match for your goals and capabilities.

Start preparing early for your interviews—and be sure to consider a wide range of options.

As you get ready to begin interviewing, keep two vital points in mind. First, recognize that the process takes time. Start your preparation and research early; the best job offers usually go to the best-prepared candidates. Second, don't limit your options by looking at only a few companies. By exploring a wide range of firms and positions, you might uncover great opportunities that you would not have found otherwise. You'll increase the odds of getting more job offers, too.

## THE TYPICAL SEQUENCE OF INTERVIEWS

Most employers interview an applicant multiple times before deciding to make a job offer. At the most selective companies, you might have a dozen or more individual interviews across several stages.[9] Depending on the company and the position, the process may stretch out over many weeks, or it may be completed in a matter of days.[10]

During the screening stage of interviews, use the limited time available to confirm your fit for the position.

Employers start with the *screening stage*, in which they filter out applicants who are unqualified or otherwise not a good fit for the position. Screening can take place on your school's campus, at company offices, via telephone (including Skype or another Internet-based phone service), or through a computer-based screening system. Time is limited in screening interviews, so keep your answers short while providing a few key points that confirm your fit for the position. If your screening interview will take place by phone, try to schedule it for a time when you can be focused and free from interruptions.[11]

During the selection stage, continue to show how your skills and attributes can help the company.

The next stage of interviews, the *selection stage*, helps the organization identify the top candidates from all those who qualify. During these interviews, show keen interest in the job, relate your skills and experience to the organization's needs, listen attentively, and ask questions that show you've done your research.

During the final stage, the interviewer may try to sell you on working for the firm.

If the interviewers agree that you're a good candidate, you may receive a job offer, either on the spot or a few days later by phone, mail, or email. In other instances, you may be invited back for a final evaluation, often by a higher-ranking executive. The objective of the *final stage* is often to sell you on the advantages of joining the organization.

## COMMON TYPES OF INTERVIEWS

Be prepared to encounter a variety of interviewing approaches. These can be distinguished by the way they are structured, the number of people involved, and the purpose of the interview.

### Structured Versus Unstructured Interviews

In a **structured interview**, the interviewer (or a computer program) asks a series of questions in a predetermined order. Structured interviews help employers identify candidates who don't meet basic job criteria, and they allow the interview team to compare answers from multiple candidates.[12]

A structured interview follows a set sequence of questions, allowing the interview team to compare answers from all candidates.

In an open-ended interview, the interviewer adapts the line of questioning based on your responses and questions.

In contrast, in an **open-ended interview**, the interviewer adapts his or her line of questioning based on the answers you give and any questions you ask. Even though it may feel like a conversation, remember that it's still an interview, so keep your answers focused and professional.

### Panel and Group Interviews

In a panel interview, you meet with several interviewers at once; in a group interview, you and several other candidates meet with one or more interviewers at once.

Although one-on-one interviews are the most common format, some employers use panel or group interviews as well. In a **panel interview**, you meet with several interviewers at once.[13] Try to make a connection with each person on the panel, and keep in mind that each person has a different perspective, so tailor your responses accordingly.[14] For example, an upper-level manager is likely to be interested in your overall business sense and strategic perspective, whereas a potential colleague might be more interested in your technical skills and ability to work in a team. In a **group interview**, one or more interviewers meet with several candidates simultaneously. A key purpose of a group interview is to observe how the candidates interact.[15] Group interviews can be tricky, because you want to stand out while coming across as a supportive team player. Be sure to treat your fellow candidates with respect, while looking for opportunities to demonstrate the depth of knowledge you have about the company and its needs.

### Behavioral, Situational, Working, and Stress Interviews

In a behavioral interview, you are asked to describe how you handled situations from your past.

Interviewing techniques also vary based on the types of questions you are asked. Perhaps the most common type of interview these days is the **behavioral interview**, in which you are asked to relate specific incidents and experiences from your past.[16] In contrast to generic questions that can often be answered with "canned" responses, behavioral questions require candidates to use their own experiences and attributes to craft answers. Studies show that behavioral interviewing is a much better predictor of success on the job than traditional interview questions.[17] To prepare for a behavioral interview, review your work or college experiences to recall several instances in which you demonstrated an important job-related attribute or dealt with a challenge such as uncooperative team members or heavy workloads. Get ready with responses that quickly summarize the situation, the actions you took, and the outcome of those actions.[18]

In situational interviews, you're asked to explain how you would handle various hypothetical situations.

A **situational interview** is similar to a behavioral interview except that the questions focus on how you would handle various hypothetical situations on the job. The situations will likely relate closely to the job you're applying for, so the more you know about the position, the better prepared you'll be.

In a working interview, you perform actual work-related tasks.

A **working interview** is the most realistic type of interview: You actually perform a job-related activity during the interview. You may be asked to lead a brainstorming session, solve a business problem, engage in role playing, or even make a presentation.[19]

Stress interviews help recruiters see how you handle yourself under pressure.

The most unnerving type of interview is the **stress interview**, during which you might be asked questions designed to unsettle you or might be subjected to long periods of silence, criticism, interruptions, or even hostile reactions by the interviewer. The theory behind this approach is that you'll reveal how well you handle stressful situations, although some experts find the technique of dubious value.[20] If you find yourself in a stress interview, recognize what is happening and collect your thoughts for a few seconds before you respond.

**MOBILE APPS**
Add the Skype mobile app to your phone to be ready for video interviews.

You might encounter two or more types of interview questions within a single interview, so stay alert and try to understand the type of question you're facing before you answer each one.

## INTERVIEW MEDIA

Expect to use a variety of media when you interview, from in-person conversations to virtual meetings.

Expect to be interviewed through a variety of media. Employers trying to cut travel costs and the demands on staff time are now interviewing candidates via telephone, email, instant messaging, virtual online systems, and videoconferencing, in addition to traditional face-to-face meetings.

Treat a telephone interview as seriously as you would an in-person interview.

To succeed at a telephone interview, make sure you treat it as seriously as an in-person interview. Be prepared with a copy of all the materials you have sent to the employer, including your résumé and any correspondence. In addition, prepare some note cards with key message points you'd like to make and questions you'd like to ask. And remember that you won't be able to use a pleasant smile, a firm handshake, and other nonverbal signals to create a good impression. A positive, alert tone of voice is therefore vital.[21]

**REAL-TIME UPDATES**

LEARN MORE BY WATCHING THIS VIDEO

**Video interviewing on Skype**

Watch this video for essential tips on preparing for and participating in an online video interview. Go to **http://real-timeupdates.com/bce7.** Under "Students," click on "Learn More."

Email and IM are also sometimes used in the screening stage. Although you have almost no opportunity to send and receive nonverbal signals with these formats, you do have the major advantage of being able to review and edit each response before you send it. Maintain a professional style in your responses, and be sure to ask questions that demonstrate your knowledge of the company and the position.[22]

When interviewing via email or IM, be sure to take a moment to review your responses before sending them.

Many employers use video technology for both live and recorded interviews. For instance, the online retailer Zappos uses video interviews on Skype to select the top two or three finalists for each position and then invites those candidates for in-person interviews.[23] Recruiters can also use mobile apps for interviews. With recorded video interviews, an online system asks a set of questions and records the respondent's answers. Recruiters then watch the videos as part of the screening process.[24] Prepare for a video interview as you would for an in-person interview—including dressing and grooming—and take the extra steps needed to become familiar with the equipment and the process. If you're interviewing from home, arrange your space so that the webcam doesn't pick up anything distracting or embarrassing in the background. During any video interview, remember to sit up straight and focus on the camera.

In a video interview, speak to the camera as though you are addressing the interviewer in person.

Online interviews can range from simple structured questionnaires and tests to sophisticated job simulations that are similar to working interviews (see Figure 14.3). These simulations help identify good candidates, give applicants an idea of what the job is like, and reduce the risk of employment discrimination lawsuits because they closely mimic actual job skills.[25]

Computer-based virtual interviews range from simple structured interviews to realistic job simulations to meetings in virtual worlds.

## WHAT EMPLOYERS LOOK FOR IN AN INTERVIEW

Interviews give employers the chance to go beyond the basic data of your résumé to get to know you and to answer two essential questions. The first is whether you can handle the responsibilities of the position. Naturally, the more you know about the demands of

Suitability for a specific job is judged on the basis of such factors as

- Academic preparation
- Work experience
- Job-related personality traits

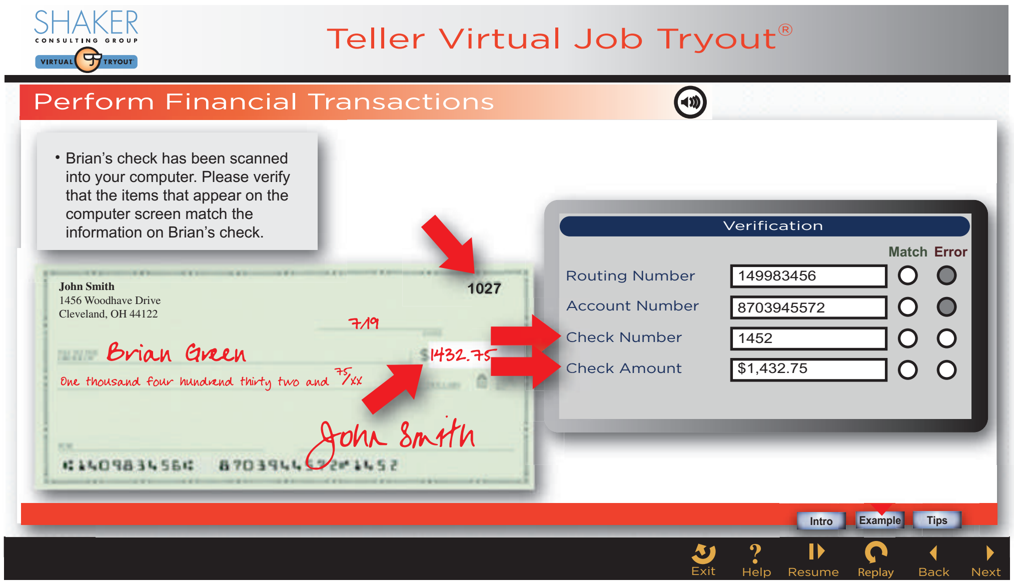


**Figure 14.3 Job Task Simulations**

Computer-based job simulations are an increasingly popular approach to testing job-related skills.

*Source:* Shaker Consulting Group.

the position, and the more you've thought about how your skills match those demands, the better you'll be able to respond.

The second essential question is whether you will be a good fit with the organization and the target position. All good employers want people who are confident, dedicated, positive, curious, courteous, ethical, and willing to commit to something larger than their own individual goals. Companies also look for fit with their individual cultures. Just like people, companies have different "personalities." Some are intense; others are more laid back. Some emphasize teamwork; others expect employees to forge their own way and even to compete with one another. Expectations also vary from job to job within a company and from industry to industry. An outgoing personality is essential for sales but less so for research, for instance.

Compatibility with an organizational culture and a position is judged on such factors as personal background, attitudes, and communication style.

### PREEMPLOYMENT TESTING AND BACKGROUND CHECKS

Preemployment tests attempt to provide objective, quantitative information about a candidate's skills, attitudes, and habits.

In an effort to improve the predictability of the selection process, many employers now conduct a variety of preemployment evaluations and investigations. Here are types of assessments you are likely to encounter during your job search:[26]

- **Integrity tests.** Integrity tests attempt to measure how truthful and trustworthy a candidate is likely to be.
- **Personality tests.** Personality tests are designed to gauge such aspects as attitudes toward work, interests, managerial potential, dependability, commitment, and motivation.
- **Cognitive tests.** Cognitive tests measure a variety of attributes involved in acquiring, processing, analyzing, using, and remembering information. Typical tests involve reading comprehension, mathematics, problem solving, and decision making.
- **Language proficiency.** You may be asked to take a reading or writing test.
- **Job knowledge and job skills tests.** These assessments measure the knowledge and skills required to succeed in a particular position. An accounting candidate, for example, might be tested on accounting principles and legal matters (knowledge) and asked to create a simple balance sheet or income statement (skills).
- **Substance tests.** A majority of companies perform some level of drug and alcohol testing. Many employers believe such testing is necessary to maintain workplace safety, ensure productivity, and protect companies from lawsuits, but others view it as an invasion of employee privacy.
- **Background checks.** In addition to testing, most companies conduct some sort of background check, including reviewing your credit record, checking to see whether you have a criminal history, and verifying your education. Moreover, you should assume that every employer will conduct a general online search on you. To help prevent a background check from tripping you up, verify that your college transcripts are current, look for any mistakes or outdated information in your credit record, plug your name into multiple search engines to see whether anything embarrassing shows up, and scour your social network profiles and connections for potential problems.

**MOBILE APPS**
The CareerBuilder app lets you search and apply for jobs from your phone or tablet.

Preemployment assessments are a complex and controversial aspect of workforce recruiting. For instance, even though personality testing is widely used, some research suggests that commonly used tests are not a reliable predictor of job success.[27] However, expect to see more innovation in this area and greater use of testing in general in the future as companies try to reduce the risks and costs of poor hiring decisions.

If you're concerned about any preemployment test, ask the employer for more information or ask your college career center for advice. You can also get more information from the Equal Employment Opportunity Commission website.

## Preparing for a Job Interview

**3 LEARNING OBJECTIVE**
List six tasks you need to complete to prepare for a successful job interview.

Now that you're armed with insights into the interviewing and assessment process, you're ready to begin preparing for your interviews. Preparation will help you feel more confident and perform better under pressure, and preparation starts with learning about the organization.

## LEARNING ABOUT THE ORGANIZATION

Employers expect serious candidates to demonstrate an understanding of the company's operations, its markets, and its strategic and tactical challenges.[28] You've already done some initial research to identify companies of interest, but when you're invited to an interview, it's time to dig a little deeper (see Table 14.2). Making this effort demonstrates your interest in the company, and it identifies you as a business professional who knows the importance of investigation and analysis.

**REAL-TIME UPDATES**

LEARN MORE BY READING THIS ARTICLE

**The ultimate interview preparation checklist**

Prepare for your next interview by following this advice. Go to **http://real-timeupdates.com/bce7.** Under "Students," click on "Learn More."

Interviewers expect you to know some basic information about the company and its industry.

In addition to learning about the company and the job opening, try to find out as much as you can about the managers who will be interviewing you, if you can get their names. Search LinkedIn in particular. It's also perfectly acceptable to ask your contact at the company for the names and titles of the people who will be interviewing you.[29] Think about ways to use whatever information you find during your interview. For example, if an interviewer lists membership in a particular professional organization, you might ask whether the organization is a good forum for people to learn about vital issues in the profession or industry. This question gives the interviewer an opportunity to talk about his or her own interests and experiences for a moment, which builds rapport and might reveal vital insights into the career path you are considering. Just make sure your questions are sincere and not uncomfortably personal.

**TABLE 14.2 Investigating an Organization and a Job Opportunity**

**Where to Look and What You Can Learn**

- *Company website, blogs, and social media accounts:* Overall information about the company, including key executives, products and services, locations and divisions, employee benefits, job descriptions
- *Competitors' websites, blogs, and social media accounts:* Similar information from competitors, including the strengths these companies claim to have
- *Industry-related websites and blogs:* Objective analysis and criticism of the company, its products, its reputation, and its management
- *Marketing materials (print and online):* The company's marketing strategy and customer communication style
- *Company publications (print and online):* Key events, stories about employees, new products
- *Your social network contacts:* Names and job titles of potential contacts within a company
- *Periodicals (newspapers and trade journals, both print and online):* In-depth stories about the company and its strategies, products, successes, and failures; you may find profiles of top executives
- *Career center at your college:* Often provides a wide array of information about companies that hire graduates
- *Current and former employees:* Insights into the work environment

**Points to Learn About the Organization**

- Full name
- Location (headquarters and divisions, branches, subsidiaries, or other units)
- Ownership (public or private; whether it is owned by another company)
- Brief history
- Products and services
- Industry position (whether the company is a leader or a minor player; whether it is an innovator or more of a follower)
- Key financial points (such as stock price and trends, if a public company)
- Growth prospects (whether the company is investing in its future through research and development; whether it is in a thriving industry)

**Points to Learn About the Position**

- Title
- Functions and responsibilities
- Qualifications and expectations
- Possible career paths
- Salary range
- Travel expectations and opportunities
- Relocation expectations and opportunities

## THINKING AHEAD ABOUT QUESTIONS

Planning ahead for the interviewer's questions will help you handle them more confidently and successfully. In addition, you will want to prepare insightful questions of your own.

### Planning for the Employer's Questions

Many general interview questions are "stock" queries you can expect to hear again and again during your interviews. Get ready to face these six at the very least:

You can expect to face a number of common questions in your interviews, so be sure to prepare for them.

- **What is the hardest decision you've ever had to make?** Be prepared with a good example (that isn't too personal), explaining why the decision was difficult, how you made the choice you made, and what you learned from the experience.
- **What is your greatest weakness?** This question seems to be a favorite of some interviewers, although it probably rarely yields useful information. One good strategy is to mention a skill or attribute you haven't had the opportunity to develop yet but would like to in your next position.[30] Another option is to discuss a past shortcoming you took steps to correct.
- **Where do you want to be five years from now?** This question tests (1) whether you're merely using this job as a stopover until something better comes along and (2) whether you've given thought to your long-term goals. Your answer should reflect your desire to contribute to the employer's long-term goals, not just your own goals. Whether this question often yields useful information is also a matter of debate, but be prepared to answer it.[31]
- **What didn't you like about previous jobs you've held?** Answer this one carefully: The interviewer is trying to predict whether you'll be an unhappy or difficult employee.[32] Describe something that you didn't like in a way that puts you in a positive light, such as having limited opportunities to apply your skills or education. Avoid making negative comments about former employers or colleagues.
- **Tell me something about yourself.** One good strategy is to briefly share the "story of you" (see page 394)—quickly summarizing where you have been and where you would like to go—in a way that aligns your interests with the company's. Alternatively, you can focus on a specific skill you know is valuable to the company, share something relevant to business that you are passionate about, or offer a short summary of what colleagues or customers think about you.[33] Whatever tactic you choose, this is not the time to be shy or indecisive, so be ready with a confident, memorable answer.
- **How do you spend your free time?** This question can pop up late in an interview, after the interviewer has covered the major work-related questions and wants to get a better idea of what sort of person you are.[34] Prepare an answer that is honest and that puts you in a positive light, without revealing more than you are comfortable revealing or suggesting that you might not fit in the corporate culture. Sports, hobbies, reading, spending time with family, and volunteer work are all "safe" answers.

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**Prepare your answers to these tough interview questions**
Use this advice to getting ready for five questions you're likely to encounter. Go to **http://real-timeupdates.com/bce7.** Under "Students," click on "Learn More."

Look for ways to frame your responses as brief stories rather than as dry facts or statements.

Continue your preparation by planning a brief answer to each question in Table 14.3.

As you prepare answers, look for ways to frame your responses as brief stories (30 to 90 seconds) rather than as simple declarative answers.[35] Cohesive stories tend to stick in the listener's mind more effectively than disconnected facts and statements.

### Planning Questions of Your Own

Preparing questions of your own helps you understand the company and the position, and it sends an important signal that you are truly interested.

Remember that an interview is a two-way conversation: The questions you ask are just as important as the answers you provide. By asking insightful questions, you can demonstrate your understanding of the organization, steer the discussion into areas that allow you to present your qualifications to best advantage, and verify for yourself whether this is a good opportunity. Plus, interviewers expect you to ask questions, and they look negatively on

**TABLE 14.3 Twenty-Five Common Interview Questions**

**Questions About College**

1. What courses in college did you like most? Least? Why?
2. Do you think your extracurricular activities in college were worth the time you spent on them? Why or why not?
3. When did you choose your college major? Did you ever change your major? If so, why?
4. Do you feel you did the best scholastic work you are capable of?
5. How has your college education prepared you for this position?

**Questions About Employers and Jobs**

6. Why did you leave your last job?
7. Why did you apply for this job opening?
8. Why did you choose your particular field of work?
9. What are the disadvantages of your chosen field?
10. What do you know about our company?
11. What do you think about how this industry operates today?
12. Why do you think you would like this particular type of job?

**Questions About Work Experiences and Expectations**

13. What was your biggest failure?
14. Describe an experience in which you learned from one of your mistakes.
15. What motivates you? Why?
16. What do you think determines a person's progress in a good organization?
17. Are you a leader or a follower?
18. What have you done that shows initiative and willingness to work?
19. Why should I hire you?

**Questions About Work Habits**

20. Do you prefer working with others or by yourself?
21. What type of boss do you prefer?
22. Have you ever had any difficulty getting along with colleagues or supervisors? With instructors? With other students?
23. What would you do if you were given an unrealistic deadline for a task or project?
24. How do you feel about overtime work?
25. How do you handle stress or pressure on the job?

*Sources:* Alison Green, "The 10 Most Common Job Interview Questions," *U.S. News & World Report*, 24 January 2011, http://money.usnews.com; "Most Common Interview Questions," Glassdoor blog, 29 December 2011, www.glassdoor.com; *The Northwestern Endicott Report* (Evanston, Ill.: Northwestern University Placement Center).

candidates who don't have any questions to ask. For good questions that you might use as a starting point, see Table 14.4 on page 424.

## BOOSTING YOUR CONFIDENCE

Interviewing is stressful for everyone, so some nervousness is natural. However, you can take steps to feel more confident. Start by reminding yourself that you have value to offer the employer, and the employer already thinks highly enough of you to invite you to an interview.

If some aspect of your appearance or background makes you uneasy, correct it if possible or offset it by emphasizing positive traits such as warmth, wit, intelligence, or charm. Instead of dwelling on your weaknesses, focus on your strengths. Instead of worrying about how you will perform in the interview, focus on how you can help the organization succeed. As with public speaking, the more prepared you are, the more confident you'll be.

The best way to build your confidence is to prepare thoroughly and address shortcomings as best you can. In other words, take action.

## POLISHING YOUR INTERVIEW STYLE

Competence and confidence are the foundation of your interviewing style, and you can enhance them by giving the interviewer an impression of poise, good manners, and good judgment. You can develop a smooth style by staging mock interviews with a friend or using an interview simulator on your phone or tablet (see Figure 14.4 on the next page). Record these mock interviews so you can evaluate yourself. Your college's career center may have computer-based systems for practicing interviews as well.

Staging mock interviews with a friend is one good way to hone your style.

TABLE 14.4 **Ten Questions to Consider Asking an Interviewer**

| Question | Reason for Asking |
|---|---|
| 1. What are the job's major responsibilities? | A vague answer could mean that the responsibilities have not been clearly defined, which is almost guaranteed to cause frustration if you take the job. |
| 2. What qualities do you want in the person who fills this position? | This will help you go beyond the job description to understand what the company really wants. |
| 3. How do you measure success for someone in this position? | A vague or incomplete answer could mean that the expectations you will face are unrealistic or ill defined. |
| 4. What is the first problem that needs the attention of the person you hire? | Not only will this help you prepare but it can signal whether you're about to jump into a problematic situation. |
| 5. Would relocation be required now or in the future? | If you're not willing to move often or at all, you need to know those expectations now. |
| 6. Why is this job now vacant? | If the previous employee got promoted, that's a good sign. If the person quit, that might not be such a good sign. |
| 7. What makes your organization different from others in the industry? | The answer will help you assess whether the company has a clear strategy to succeed in its industry and whether top managers communicate this to lower-level employees. |
| 8. How would you define your organization's managerial philosophy? | You want to know whether the managerial philosophy is consistent with your own working values. |
| 9. What is a typical workday like for you? | The interviewer's response can give you clues about daily life at the company. |
| 10. What are the next steps in the selection process? What's the best way to follow up with you? | Knowing where the company is in the hiring process will give you clues about following up after the interview and possibly give you hints about where you stand. |

*Sources:* Heather Huhman, "5 Must-Ask Questions at Job Interviews," Glassdoor blog, 7 February 2012, www.glassdoor.com; Joe Conklin, "Turning the Tables: Six Questions to Ask Your Interviewer," *Quality Progress*, November 2007, 55; Andrea N. Browne, "Keeping the Momentum at the Interview; Ask Questions, Do Your Research, and Be a Team Player," *Washington Post*, 29 July 2007, K1.

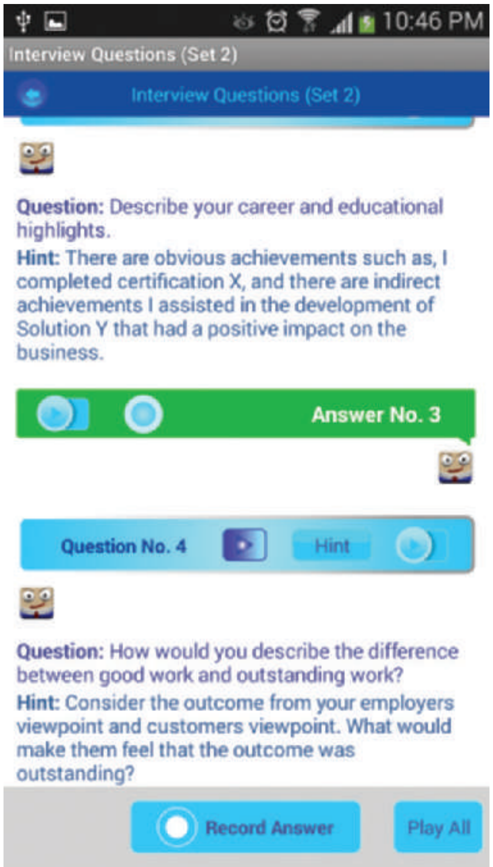


**Figure 14.4** **Interview Simulators**
A number of mobile apps are available to help you practice and polish your interviewing skills
*Source:* Taken from Interview Simulator.com © Copyright 2014 by Villatech pty ltd. Used with permission by the publisher. 

**TABLE 14.5 Warning Signs: 25 Attributes Interviewers Don't Like to See**

1. Poor personal appearance
2. Overbearing, overaggressive, or conceited demeanor; a "superiority complex"; a know-it-all attitude
3. Inability to express ideas clearly; poor voice, diction, or grammar
4. Lack of knowledge or experience
5. Poor preparation for the interview
6. Lack of interest in the job
7. Lack of planning for career; lack of purpose or goals
8. Lack of enthusiasm; passive and indifferent demeanor
9. Lack of confidence and poise; appearance of being nervous and ill at ease
10. Insufficient evidence of achievement
11. Failure to participate in extracurricular activities
12. Overemphasis on money; interest only in the best offer
13. Poor scholastic record
14. Unwillingness to start at the bottom; expecting too much too soon
15. Tendency to make excuses
16. Evasive answers; hedging on unfavorable factors in record
17. Lack of tact
18. Lack of maturity
19. Lack of courtesy and common sense, including answering mobile phones, texting, or chewing gum during the interview
20. Being critical of past or present employers
21. Lack of social skills
22. Marked dislike for schoolwork
23. Lack of vitality
24. Failure to look interviewer in the eye
25. Limp, weak handshake

*Sources:* Donna Fuscaldo, "Seven Deadly Interview Sins," Glassdoor blog, 4 April 2012, www.glassdoor.com; "Employers Reveal Outrageous and Common Mistakes Candidates Made in Job Interviews, According to New CareerBuilder Survey," CareerBuilder.com, 12 January 2011, www.careerbuilder.com; *The Northwestern Endicott Report* (Evanston, Ill.: Northwestern University Placement Center).

After each practice session, look for opportunities to improve. Have your mock interview partner critique your performance, or critique yourself if you're able to record your practice interviews, using the list of warning signs shown in Table 14.5. Pay close attention to the length of your planned answers as well. Interviewers want you to give complete answers, but they don't want you to take up valuable time or test their patience by chatting about minor or irrelevant details.[36]

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In addition to reviewing your answers, evaluate your nonverbal behavior, including your posture, eye contact, facial expressions, and hand gestures and movements. Do you come across as alert and upbeat or passive and withdrawn? Pay close attention to your speaking voice as well. If you tend to speak in a monotone, for instance, practice speaking in a livelier style, with more inflection and emphasis. And watch out for "filler words" such as *uh* and *um*. Many people start sentences with a filler without being conscious of doing so. Train yourself to pause silently for a moment instead as you gather your thoughts and plan what to say.

Evaluate the length and clarity of your answers, your nonverbal behavior, and the quality of your voice.

## PRESENTING A PROFESSIONAL IMAGE

Clothing and grooming are important elements of preparation because they reveal something about a candidate's personality, professionalism, and ability to sense the unspoken "rules" of a situation. Your research into various industries and professions should give you insight into expectations for business attire. If you're not sure what to wear, ask someone who works in the same industry or even visit the company at the end of the day and see what employees are wearing as they leave the office. You don't need to spend a fortune on interview clothes, but your clothes must be clean, pressed, and appropriate. The following look will serve you well in just about any interview situation:[37]

Dress conservatively and be well groomed for every interview.

- Neat, "adult" hairstyle
- For more formal environments, a conservative business suit (for women, that means no exposed midriffs, short skirts, or plunging necklines) in dark solid color or a subtle pattern such as pinstripes; white shirt and understated tie for men; coordinated blouse for women
- For less formal environments, smart-looking "business casual," including a pressed shirt or blouse and nice slacks or a skirt
- Limited jewelry (men, especially, should wear very little jewelry)
- No visible piercings other than one or two earrings (for women only)
- No visible tattoos
- Stylish but professional-looking shoes (no extreme high heels or casual shoes)

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- Clean hands and nicely trimmed fingernails
- Little or no perfume or cologne (some people are allergic and many people are put off by strong smells)
- Subtle makeup (for women)
- Exemplary personal hygiene

An interview is not the place to express your individuality or to let your inner rebel run wild. Send a clear signal that you understand the business world and know how to adapt to it. You won't be taken seriously otherwise.

If you want to be taken seriously, dress and act seriously.

### BEING READY WHEN YOU ARRIVE

Be ready to go the minute you arrive at the interviewing site; don't fumble around for your résumé or your list of questions.

When you go to your interview, take a small notebook, a pen, a list of the questions you want to ask, several copies of your résumé (protected in a folder), an outline of what you have learned about the organization, and any past correspondence about the position. You may also want to take a small calendar, a transcript of your college grades, a list of references, and a portfolio containing samples of your work, performance reviews, and certificates of achievement.[38] Think carefully if you plan to use a tablet computer or any other device for note taking or reference during an interview. You don't want to waste any of the interviewer's time fumbling with it. Also, turn off your mobile phone; in a recent survey of hiring professionals, answering calls or texting while in an interview was identified as the most common mistake job candidates make during their interviews.[39]

Be sure you know when and where the interview will be held. The worst way to start any interview is to be late. Verify the route and time required to get there, even if that means traveling there ahead of time. Plan to arrive early, but don't approach the reception desk until 5 minutes or so before your appointed time.[40] Chances are the interviewer won't be ready to receive you until the scheduled time.

If you have to wait for the interviewer, use this time to review the key messages about yourself you want to get across in the interview. Conduct yourself professionally while waiting. Show respect for everyone you encounter, and avoid chewing gum, eating, or drinking. Anything you do or say at this stage may get back to the interviewer, so make sure your best qualities show from the moment you enter the premises.

## Interviewing for Success

**4** LEARNING OBJECTIVE
Explain how to succeed in all three stages of an interview.

At this point, you have a good sense of the overall process and know how to prepare for your interviews. The next step is to get familiar with the three stages of every interview: the warm-up, the question-and-answer session, and the close.

### THE WARM-UP

The first minute of the interview is crucial, so stay alert and be on your best business behavior.

Of the three stages, the warm-up is the most important, even though it may account for only a small fraction of the time you spend in the interview. Studies suggest that many interviewers make up their minds within the first 20 seconds of contact with a candidate.[41] Don't let your guard down if the interviewer engages in what feels like small talk; these exchanges are every bit as important as structured questions.

Body language is crucial at this point. Stand or sit up straight, maintain regular but natural eye contact, and don't fidget. When the interviewer extends a hand, respond with a firm but not overpowering handshake. Repeat the interviewer's name when you're introduced ("It's a pleasure to meet you, Ms. Litton"). Wait until you're asked to be seated or the interviewer has taken a seat. Let the interviewer start the discussion, and be ready to answer one or two substantial questions right away. The following are some common openers:[42]

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- Why do you want to work here?
- What do you know about us?
- Tell me a little about yourself.

Recognize that you could face substantial questions as soon as your interview starts, so make sure you are prepared and ready to go.

## THE QUESTION-AND-ANSWER STAGE

Questions and answers usually consume the greatest part of the interview. Depending on the type of interview, the interviewer will likely ask about your qualifications, discuss some of the points mentioned in your résumé, and ask about how you have handled particular situations in the past or would handle them in the future. You'll also be asking questions of your own.

**MOBILE APPS**
Monster's mobile app offers helpful tips to help you prepare for your next job interviews.

### Answering and Asking Questions

Let the interviewer lead the conversation and never answer a question before he or she has finished asking it. Not only is this type of interruption rude, but the last few words of the question might alter how you respond. As much as possible, avoid one-word yes-or-no answers. Use the opportunity to expand on a positive response or explain a negative response. If you're asked a difficult question or the offbeat questions that companies such as Zappos and Google are known to use, pause before responding. Think through the implications of the question. For instance, the recruiter may know that you can't answer a question and only wants to know how you'll respond under pressure or whether you can construct a logical approach to solving a problem.

Listen carefully to questions before you answer.

Whenever you're asked if you have any questions, or whenever doing so naturally fits the flow of the conversation, ask a question from the list you've prepared. Probe for what the company is looking for in its new employees so that you can show how you meet the firm's needs. Also try to zero in on any reservations the interviewer might have about you so that you can dispel them.

### Listening to the Interviewer

Paying attention when the interviewer speaks can be as important as giving good answers or asking good questions. Review the tips on listening offered in Chapter 2. The interviewer's facial expressions, eye movements, gestures, and posture may tell you the real meaning of what is being said. Be especially aware of how your answers are received. Does the interviewer nod in agreement or smile to show approval? If so, you're making progress. If not, you might want to introduce another topic or modify your approach.

Paying attention to both verbal and nonverbal messages can help you turn the question-and-answer stage to your advantage.

### Handling Potentially Discriminatory Questions

A variety of federal, state, and local laws prohibit employment discrimination on the basis of race, ethnicity, gender, age (at least if you're between 40 and 70), marital status, religion, national origin, or disability. Interview questions designed to elicit information on these topics are potentially illegal.[43] Table 14.6 on the next page compares some specific questions that employers are and are not allowed to ask during an employment interview.

Federal, state, and local laws prohibit employment discrimination based on a variety of factors, and well-trained interviewers know to avoid questions that could be used to discriminate in the hiring process.

If an interviewer asks a potentially unlawful question, consider your options carefully before you respond. You can answer the question as it was asked, you can ask tactfully whether the question might be prohibited, you can simply refuse to answer it, or you can try to answer "the question behind the question."[44] For example, if an interviewer inappropriately asks whether you are married or have strong family ties in the area, he or she might be trying to figure out if you're willing to travel or relocate—both of which are acceptable questions. Only you can decide which is the right choice based on the situation.

Think about how you might respond if you were asked a potentially unlawful question.

Even if you do answer the question as it was asked, think hard before accepting a job offer from this company if you have alternatives. Was the off-limits question possibly accidental (it happens) and therefore not really a major concern? If you think it was intentional, would you want to work for an organization that condones illegal or discriminatory questions or that doesn't train its employees to avoid them?

If you believe an interviewer's questions to be unreasonable, unrelated to the job, or an attempt to discriminate, you have the option of filing a complaint with the U.S. Equal

**TABLE 14.6 Acceptable Versus Potentially Discriminatory Interview Questions**

| Interviewers May Ask This . . . | But Not This |
|---|---|
| What is your name? | What was your maiden name? |
| Are you over 18? | When were you born? |
| Did you graduate from high school? | When did you graduate from high school? |
| [No questions about race are allowed.] | What is your race? |
| Can you perform [specific tasks]? | Do you have physical or mental disabilities?<br>Do you have a drug or alcohol problem?<br>Are you taking any prescription drugs? |
| Would you be able to meet the job's requirement to frequently work weekends? | Would working on weekends conflict with your religion? |
| Do you have the legal right to work in the United States? | What country are you a citizen of? |
| Have you ever been convicted of a felony? | Have you ever been arrested? |
| This job requires that you speak Spanish. Do you? | What language did you speak in your home when you were growing up? |

*Sources:* Dave Johnson, "Illegal Job Interview Questions," CBS Money Watch, 27 February 2012, www.cbsnew.com; "5 Illegal Interview Questions and How to Dodge Them," *Forbes*, 20 April 2012, www.forbes.com; Deanna G. Kucler, "Interview Questions: Legal or Illegal?" *Workforce Management*, accessed 28 September 2005, www.workforce.com.

Employment Opportunity Commission or with the agency in your state that regulates fair employment practices.

## THE CLOSE

Like the warm-up, the end of the interview is more important than its brief duration would indicate. These last few minutes are your final opportunity to emphasize your value to the organization and to correct any misconceptions the interviewer might have. Be aware that many interviewers will ask whether you have any more questions at this point, so save one or two from your list.

### Concluding Gracefully

Conclude an interview with courtesy and enthusiasm.

You can usually tell when the interviewer is trying to conclude the session. He or she may ask whether you have any more questions, check the time, summarize the discussion, or simply tell you that the allotted time for the interview is up. When you get the signal, be sure to thank the interviewer for the opportunity and express your interest in the organization. If you can do so comfortably, try to pin down what will happen next, but don't press for an immediate decision.

If this is your second or third visit to the organization, the interview may end with an offer of employment. If you have other offers or need time to think about this offer, it's perfectly acceptable to thank the interviewer for the offer and ask for some time to consider it. If no job offer is made, the interview team may not have reached a decision yet, but you may tactfully ask when you can expect to know the decision.

### Discussing Salary

Research salary ranges in your job, industry, and geographic region before you try to negotiate salary.

If you receive an offer during the interview, you'll naturally want to discuss salary. However, let the interviewer raise the subject. If asked your salary requirements during the interview or on a job application, you can say that your requirements are open or negotiable or that you would expect a competitive compensation package.[45]

How far you can negotiate depends on several factors, including market demand for your skills, the strength of the job market, the company's compensation policies, the company's financial health, and any other job offers you may be considering. Remember that you're negotiating a business deal, not asking for personal favors, so focus on the unique value you can bring to the job. The more information you have, the stronger your position will be.

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If salary isn't negotiable, look at the overall compensation and benefits package. You may find flexibility in a signing bonus, profit sharing, retirement benefits, health coverage, vacation time, and other valuable elements.[46]

Negotiating benefits may be one way to get more value from an employment package.

### INTERVIEW NOTES

Maintain a notebook or simple database with information about each company, interviewers' answers to your questions, contact information for each interviewer, the status of follow-up communication, and upcoming interview appointments. Carefully organized notes will help you decide which company is the right fit for you when it comes time to choose from among the job offers you receive.

Keeping a careful record of your job interviews is essential.

For the latest information on interviewing strategies, visit **http://real-timeupdates.com/bce7** and click on Chapter 14.

## Following Up After an Interview

Staying in contact with a prospective employer after an interview shows that you really want the job and are determined to get it. Doing so also gives you another chance to demonstrate your communication skills and sense of business etiquette. Following up brings your name to the interviewer's attention once again and reminds him or her that you're actively looking and waiting for the decision.

Any time you hear from a company during the application or interview process, be sure to respond quickly. Companies flooded with résumés may move on to another candidate if they don't hear back from you within 24 hours.[47]

5 LEARNING OBJECTIVE
Identify the most common employment messages that follow an interview, and explain when you would use each one.

### FOLLOW-UP MESSAGE

Send a follow-up message within two days of the interview, even if you feel you have little chance of getting the job. These messages are often referred to as "thank-you notes," but they give you an important opportunity to go beyond merely expressing your appreciation. You can use the message to reinforce the reasons you are a good choice for the position, modify any answers you gave during the interview if you realize you made a mistake or have changed your mind, and respond to any negatives that might have arisen in the interview (see Figure 14.5 on the next page).[48] Email is usually acceptable for follow-up messages, unless the interviewer has asked you to use other media.

A follow-up message after an interview is more than a professional courtesy; it's another chance to promote yourself to an employer.

### MESSAGE OF INQUIRY

If you're not advised of the interviewer's decision by the promised date or within two weeks, you might make an inquiry. A message of inquiry (which can be handled by email if the interviewer has given you his or her email address) is particularly appropriate if you've received a job offer from a second firm and don't want to accept it before you have an answer from the first. The following message illustrates the general model for a direct request:

Use the model for a direct request when you write an inquiry about a hiring decision.

When we talked on April 7 about the fashion coordinator position in your Park Avenue showroom, you indicated that a decision would be made by May 1. I am still enthusiastic about the position and eager to know what conclusion you've reached.

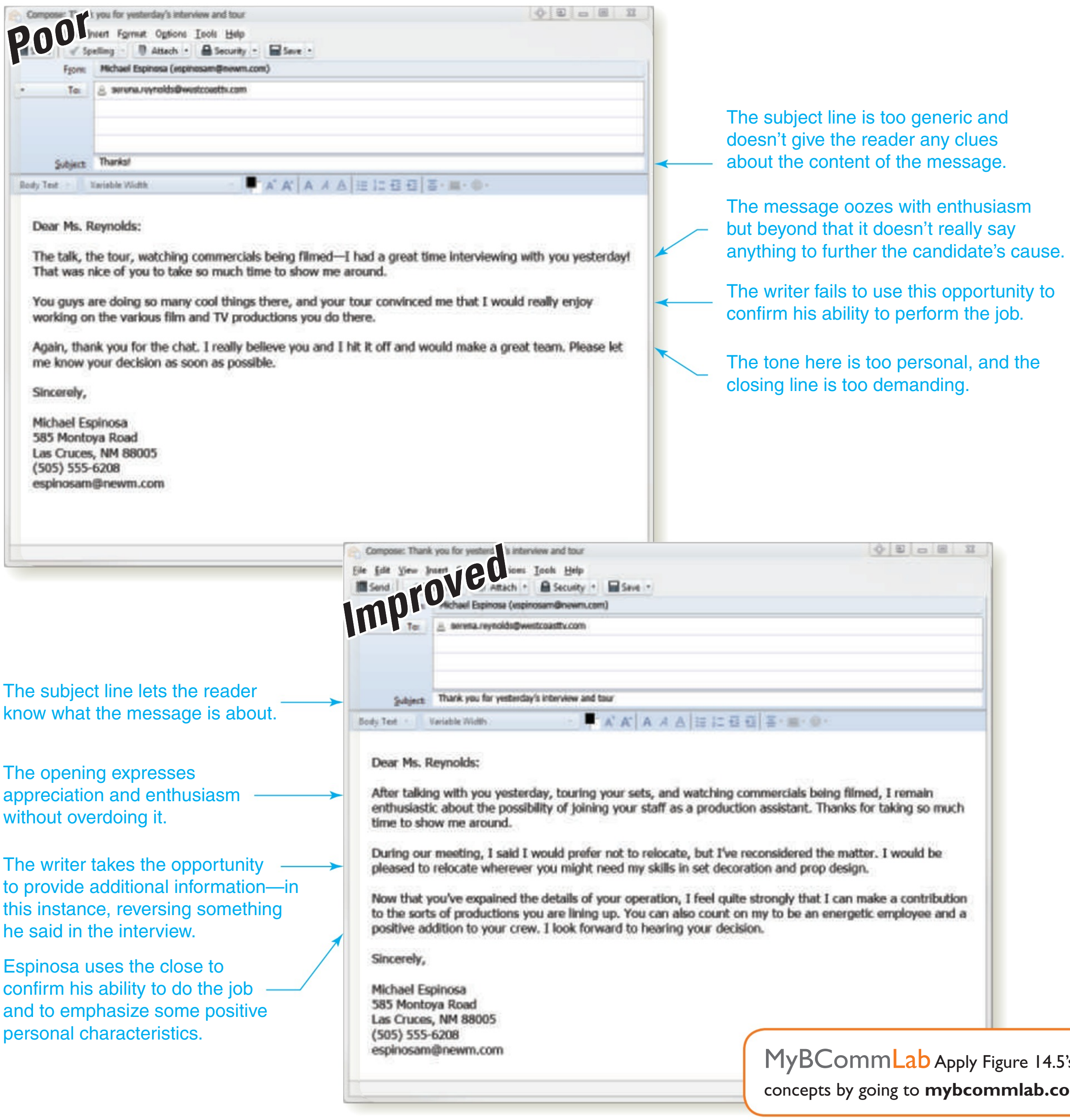
Identifies the position and introduces the main idea

To complicate matters, another firm has now offered me a position and has asked that I reply within the next two weeks.

Places the reason for the request second

Because your company seems to offer a greater challenge, I would appreciate knowing about your decision by Thursday, May 12. If you need more information before then, please let me know.

Makes a courteous request for specific action last, while clearly stating a preference for this organization


Poor

Subject: Thanks!

Dear Ms. Reynolds:

The talk, the tour, watching commercials being filmed—I had a great time interviewing with you yesterday! That was nice of you to take so much time to show me around.

You guys are doing so many cool things there, and your tour convinced me that I would really enjoy working on the various film and TV productions you do there.

Again, thank you for the chat. I really believe you and I hit it off and would make a great team. Please let me know your decision as soon as possible.

Sincerely,

Michael Espinosa
585 Montoya Road
Las Cruces, NM 88005
(505) 555-6208
espinosam@newm.com

Improved

Subject: Thank you for yesterday's interview and tour

Dear Ms. Reynolds:

After talking with you yesterday, touring your sets, and watching commercials being filmed, I remain enthusiastic about the possibility of joining your staff as a production assistant. Thanks for taking so much time to show me around.

During our meeting, I said I would prefer not to relocate, but I've reconsidered the matter. I would be pleased to relocate wherever you might need my skills in set decoration and prop design.

Now that you've explained the details of your operation, I feel quite strongly that I can make a contribution to the sorts of productions you are lining up. You can also count on my to be an energetic employee and a positive addition to your crew. I look forward to hearing your decision.

Sincerely,

Michael Espinosa
585 Montoya Road
Las Cruces, NM 88005
(505) 555-6208
espinosam@newm.com



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**Figure 14.5 Follow-Up Message: Poor and Improved**
Use the follow-up message after an interview to express continued interest in the opportunity, to correct or expand on any information you provided in the interview, and to thank the interviewer for his or her time.

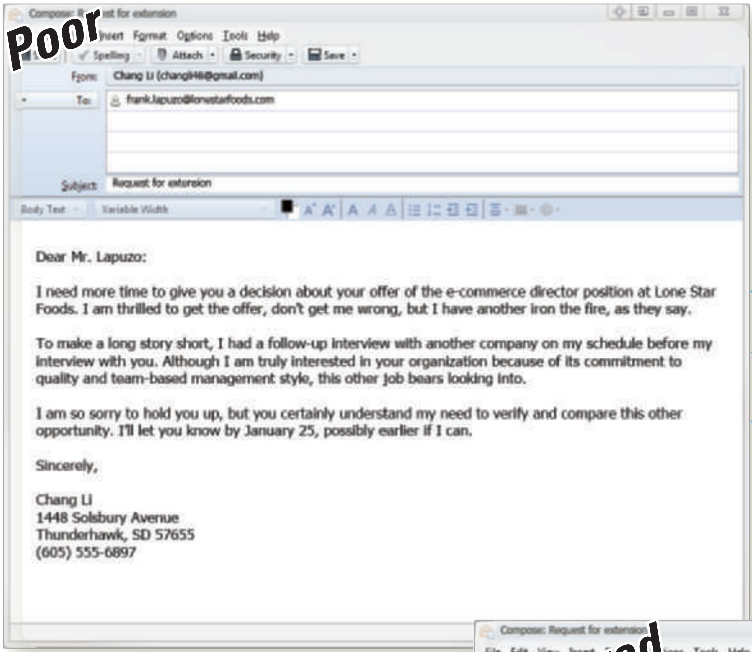
## REQUEST FOR A TIME EXTENSION

If you receive a job offer while other interviews are still pending, you can ask the employer for a time extension. Open with a strong statement of your continued interest in the job, ask for more time to consider the offer, provide specific reasons for the request, and assure the reader that you will respond by a specific date (see Figure 14.6).

## LETTER OF ACCEPTANCE

Use the model for positive messages when you write a letter of acceptance.

When you receive a job offer you want to accept, reply within five days. Begin by accepting the position and expressing thanks. Identify the job you're accepting. In the next paragraph, cover any necessary details. Conclude by saying that you look forward to reporting for work. As always, a positive letter should convey your enthusiasm and eagerness to cooperate:


Poor

Composer: Request for extension

From: Chang Li (changli46@gmail.com)

To: frank.lapuzo@lonestarfoods.com

Subject: Request for extension

Dear Mr. Lapuzo:

I need more time to give you a decision about your offer of the e-commerce director position at Lone Star Foods. I am thrilled to get the offer, don't get me wrong, but I have another iron the fire, as they say.

To make a long story short, I had a follow-up interview with another company on my schedule before my interview with you. Although I am truly interested in your organization because of its commitment to quality and team-based management style, this other job bears looking into.

I am so sorry to hold you up, but you certainly understand my need to verify and compare this other opportunity. I'll let you know by January 25, possibly earlier if I can.

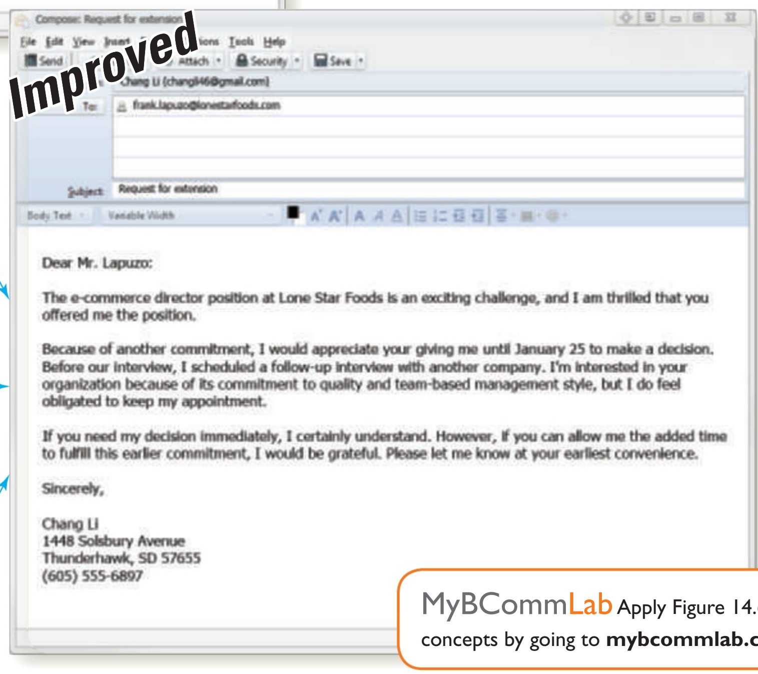
Sincerely,

Chang Li
1448 Solsbury Avenue
Thunderhawk, SD 57655
(605) 555-6897

"I need" is a blunt and fairly offensive way to start any message, and particularly so when one is asking the reader to make an accommodation.

"To make a long story short" only makes the story longer, and saying "this other job bears looking into" sounds self-centered.

Apologizing isn't necessary under the circumstances, but the writer then commits a serious blunder by failing to ask for the extension to January 25.


Improved

Compose: Request for extension

From: Chang Li (changli46@gmail.com)

To: frank.lapuzo@lonestarfoods.com

Subject: Request for extension

Dear Mr. Lapuzo:

The e-commerce director position at Lone Star Foods is an exciting challenge, and I am thrilled that you offered me the position.

Because of another commitment, I would appreciate your giving me until January 25 to make a decision. Before our interview, I scheduled a follow-up interview with another company. I'm interested in your organization because of its commitment to quality and team-based management style, but I do feel obligated to keep my appointment.

If you need my decision immediately, I certainly understand. However, if you can allow me the added time to fulfill this earlier commitment, I would be grateful. Please let me know at your earliest convenience.

Sincerely,

Chang Li
1448 Solsbury Avenue
Thunderhawk, SD 57655
(605) 555-6897

This positive opener confirms the writer's interest in the job and serves as buffer before the upcoming request.

Phrasing this as the need to meet a prior commitment is a graceful way to communicate the idea of wanting to explore the other opportunity, without coming right out and saying so.

The respectful close acknowledges that it might not be possible for the reader to accommodate the request for an extension. The conditional phrasing ("if you can") is a good way to make the request without coming across as demanding.

MyBCommLab Apply Figure 14.6's key concepts by going to **mybcommlab.com**

**Figure 14.6 Request for a Time Extension: Poor and Improved**
Needing more time to decide on a job offer is not uncommon, particularly for candidates with desirable credentials. However, make the request in a respectful and subtle way. The reader understands you are comparing opportunities and looking for the best offer, so you don't need to belabor this point.

I'm delighted to accept the graphic design position in your advertising department at the salary of $3,875 per month.

Confirms the specific terms of the offer with a good-news statement at the beginning

Enclosed are the health insurance forms you asked me to complete and sign. I've already given notice to my current employer and will be able to start work on Monday, January 18.

Covers miscellaneous details in the body

The prospect of joining your firm is exciting. Thank you for giving me this opportunity, and I look forward to making a positive contribution.

Closes with another reference to the good news and a look toward the future

Written acceptance of a job offer can be considered a legally binding contract.

Be aware that a job offer and a written acceptance of that offer can constitute a legally binding contract, for both you and the employer. Before you send an acceptance letter, be sure you want the job.

## LETTER DECLINING A JOB OFFER

If you decide to decline a job offer, do so tactfully, using the model for negative messages.

After all your interviews, you may find that you need to write a letter declining a job offer. Use the techniques for negative messages (see Chapter 8): Open warmly, state the reasons for refusing the offer, decline the offer explicitly, and close on a pleasant note that expresses gratitude. By taking the time to write a sincere, tactful letter, you leave the door open for future contact:

Uses a buffer in the opening paragraph

- Thank you for your hospitality during my interview at your Durham facility last month. I'm flattered that you would offer me the computer analyst position that we talked about.

Precedes the bad news with tactfully phrased reasons for the applicant's unfavorable decision

- I was fortunate to receive two job offers during my search. Because my desire to work abroad can more readily be satisfied by another company, I have accepted that job offer.

Lets the reader down gently with a sincere and cordial ending

- I deeply appreciate the time you spent talking with me. Thank you again for your consideration and kindness.

## LETTER OF RESIGNATION

Letters of resignation should always be written in a gracious and professional style that avoids criticism of your employer or your colleagues.

If you get a job offer while employed, you can maintain good relations with your current employer by writing a thoughtful letter of resignation to your immediate supervisor. Follow the advice for negative messages and make the letter sound positive, regardless of how you feel. Say something favorable about the organization, the people you work with, or what you've learned on the job. Then state your intention to leave and give the date of your last day on the job. Be sure you give your current employer at least two weeks' notice.

Uses an appreciative opening to serve as a buffer

- My sincere thanks to you and to all the other Emblem Corporation employees for helping me learn so much about serving the public these past two years. You have given me untold help and encouragement.

States reasons before the bad news itself, using tactful phrasing to help keep the relationship friendly, should the writer later want letters of recommendation

- You may recall that when you first interviewed me, my goal was to become a customer-relations supervisor. Because that opportunity has been offered to me by another organization, I am submitting my resignation. I will miss my friends and colleagues at Emblem, but I want to take advantage of this opportunity.

Discusses necessary details in an extra paragraph

- I would like to terminate my work here two weeks from today (June 13) but can arrange to work an additional week if you want me to train a replacement.

Tempers any disappointment with a cordial close

- My sincere thanks and best wishes to all of you.

# Chapter Review and Activities

## Learning Objectives: Check Your Progress

**Objective 1: Explain the purposes of application letters, and describe how to apply the AIDA organizational approach to them.**

The purposes of an application letter are to introduce your résumé, persuade an employer to read it, and request an interview. With the AIDA model, get attention in the opening paragraph by showing how your work skills could benefit the organization, by explaining how your qualifications fit the job, or by demonstrating an understanding of the organization's needs. Build interest and desire by showing how you can meet the job requirements and, near the end of this section, be sure to refer your reader to your résumé. Finally, motivate action by making your request easy to fulfill and by including all necessary contact information.

**Objective 2: Describe the typical sequence of job interviews, the major types of interviews, and the attributes employers look for during an interview.**

The typical sequence of interviews involves three stages. During the screening stage, employers filter out unqualified applicants and identify promising candidates. During the selection stage, the pool of applicants is narrowed through a variety of structured and unstructured interviewing methods. In the final stage, employers select the candidates who will receive offers and, if necessary, promote the benefits of joining the company.

Interviews can be distinguished by the way they are structured (structured or unstructured interviews), the number of people involved (one-on-one, panel, or group interviews), and the purpose of the interview (behavioral, situational, working, or stress interviews). The behavioral interview, probably the most common in terms of purpose, requires candidates to use their own experiences and attributes to craft answers. The situational interview is similar, but instead of using incidents from the candidate's past, it explores how the candidate would respond to hypothetical situations in the future.

Employers look for two things during an employment interview. First, they seek evidence that an applicant is qualified for the position. Second, they seek reassurance that an applicant will be a good fit with the "personality" of the organization and the position.

**Objective 3: List six tasks you need to complete to prepare for a successful job interview.**

To prepare for a successful job interview, (1) complete the research you started when planning your résumé, (2) think ahead about questions you'll need to answer and questions you'll want to ask, (3) boost your confidence by focusing on your strengths and preparing thoroughly, (4) polish your interviewing style, (5) present a professional image with businesslike clothing and good grooming, and (6) arrive on time and ready to begin.

**Objective 4: Explain how to succeed in all three stages of an interview.**

All employment interviews have three stages. The warm-up stage is the most important because first impressions greatly influence an interviewer's decision. The question-and-answer stage, during which you will answer and ask questions, is the longest. The close is your final opportunity to promote your value to the organization and counter any misconceptions the interviewer may have.

**Objective 5: Identify the most common employment messages that follow an interview, and explain when you would use each one.**

Following an interview, send a thank-you message to show appreciation, emphasize your strengths, and politely ask for a decision. Send an inquiry if you haven't received the interviewer's decision by the date promised or within one or two weeks of the interview—especially if you've received a job offer from another firm. You can request a time extension if you need more time to consider an offer. Send a letter of acceptance after receiving a job offer you want to take. Send a letter declining a job offer when you want to refuse an offer tactfully. Finally, if you are currently employed, send a letter of resignation after you have accepted the offer of another job.

MyBCommLab

Go to **mybcommlab.com** to complete the problems marked with this icon ✪.

## Test Your Knowledge

To review chapter content related to each question, refer to the indicated Learning Objective.

✪ **14-1.** What information or questions can you use when writing a follow-up message after submitting a résumé? [LO-1]

**14-2.** What are the common types of interviews one should be aware of? [LO-2]

**14-3.** How does a structured interview differ from an open-ended interview? [LO-2]

✪ **14-4.** What are the three stages of every interview, and which is the most important? [LO-4]

## Apply Your Knowledge

To review chapter content related to each question, refer to the indicated Learning Objective.

**14-5.** How can you distinguish yourself from other candidates in a screening interview and still keep your responses short and to the point? Explain. [LO-2]

✪ **14-6.** How could use you the group interview format to distinguish yourself as a team player? [LO-2]

✪ **14-7.** If you lack one important qualification for a job but have made it past the initial screening stage, how should you prepare to handle this issue during the next round of interviews? Explain your answer. [LO-3]

**14-8.** If your interviewer asked you to describe what you did not like about your previous job, how would you respond? [LO-3]

✪ **14-9.** Why is paying attention to an interviewer's verbal and nonverbal cues as important as responding to questions? [LO-4]

## Practice Your Skills

### Activities

Each activity is labeled according to the primary skill or skills you will need to use. To review relevant chapter content, you can refer to the indicated Learning Objective. In some instances, supporting information will be found in another chapter, as indicated.

**14-10. Message Strategies: Employment Messages [LO-1]** Revise this message so that it follows this chapter's guidelines.

I'm writing to let you know about my availability for the brand manager job you advertised. As you can see from my enclosed résumé, my background is perfect for the position. Even though I don't have any real job experience, my grades have been outstanding considering that I went to a top-ranked business school.

I did many things during my undergraduate years to prepare me for this job:

Earned a 3.4 out of a 4.0 with a 3.8 in my business courses
Elected representative to the student governing association
Selected to receive the Lamar Franklin Award
Worked to earn a portion of my tuition

I am sending my résumé to all the top firms, but I like yours better than any of the rest. Your reputation is tops in the industry, and I want to be associated with a business that can pridefully say it's the best.

If you wish for me to come in for an interview, I can come on a Friday afternoon or anytime on weekends when I don't have classes. Again, thanks for considering me for your brand manager position.

**14-11. Message Strategies: Employment Messages [LO-1]** Revise this message so that it follows this chapter's guidelines.

I am writing to inform you that it has been over a month since I posted my résumé on your job portal. I understand that you must be in the process of reviewing résumés and the process takes time, but I am concerned as I have not heard from your company. I understand that the closing date for receiving applications is a week from now.

I have tried to call your office and speak to someone from your recruiting team, but your operator could not connect me to the person responsible for this position. Having failed to hear from your organization, I was naturally concerned as I believe my profile closely fits the position of Senior Administration Manager for your piston assembly plant.

I have a great deal of experience from my ten years as a supervisor for crank and piston assembly at Marshall & Sons, during which I worked with the best technology in the business. With my considerable supervisory experience, I will be able to competently lead your team in maintaining delivery schedules.

Would you please let me know when I might expect to hear from you? I would love to work for your company as I believe it is the best in piston assembly, and more importantly, an equal-opportunity employer.

**14-12. Career Management: Preparing for Interviews [LO-2]** Google yourself, Bing yourself, scour your social networking profiles, review your Twitter messages, and explore every other possible online source you can think of that might have something about you. If you find anything potentially embarrassing, remove it if possible. Write a summary of your search-and-destroy mission (you can skip any embarrassing details in your report to your instructor!).

**14-13. Career Management: Researching Target Employers [LO-3]** Select a large company (one on which you can easily find information) where you might like to work. Use online sources to gather some preliminary research on the company; don't limit your search to the company's own website.

- What did you learn about this organization that would help you during an interview there?
- What Internet sources did you use to obtain this information?
- Armed with this information, what aspects of your background do you think might appeal to this company's recruiters?
- If you choose to apply for a job with this company, what keywords would you include on your résumé? Why?

**14-14. Career Management: Interviewing [LO-3]** Prepare written answers to 10 of the questions listed in Table 14.3 on page 423.

**14-15. Career Management: Interviewing [LO-3]** You're being interviewed for a mid-management position with a premier power sector company. How would you gauge whether your interviewer is impressed with you? At the end, your interviewer asks you whether you have any questions to ask. List some smart questions you would ask.

**14-16. Career Management: Interviewing; Collaboration: Team Projects [LO-4], Chapter 2** Divide the class into two groups. Half the class will be recruiters for a large chain of national department stores, looking to fill 15 manager-trainee positions. The other half of the class will be candidates for the job. The company is specifically looking for candidates who demonstrate these three qualities: initiative, dependability, and willingness to assume responsibility.

- Have each recruiter select and interview an applicant for 10 minutes.
- Have all the recruiters discuss how they assessed the applicant in each of the three desired qualities. What questions did they ask or what did they use as an indicator to determine whether the candidate possessed the quality?
- Have all the applicants discuss what they said to convince the recruiters that they possessed each of the three desired qualities.

**14-17. Message Strategies: Employment Messages [LO-5]** Revise this message so that it follows this chapter's guidelines.

I had a meeting with you a fortnight ago for the position of product manager with your company. Thank you so much for your time. I once again apologize for reaching 15 minutes later than scheduled due to the traffic snarl at East Street, as I explained that day. I had tried contacting you on your direct number, but your phone was continuously busy. I left you a voice mail message too. However, you were kind and understanding and few would have been as considerate in your position. So once again, thanks!

As I mentioned to you, I am looking at other opportunities and have been interviewed by three other prospective employers since our interaction. However, there could be nothing better than working for a boss as calm and unassuming as you. I think I would be an ideal candidate for the position and would fit well with your organization. I am on vacation till Friday, but you can reach me on my mobile phone (no.: 877-9098).

**14-18. Message Strategies: Employment Messages [LO-5]** Revise this message so that it follows this chapter's guidelines.

I have recently received a very attractive job offer from the Warrington Company. But before I let them know one way or another, I would like to consider any offer that your firm may extend. I was quite impressed with your company during my recent interview, and I am still very interested in a career there.

I don't mean to pressure you, but Warrington has asked for my decision within 10 days. Could you let me know by Tuesday whether you plan to offer me a position? That would give me enough time to compare the two offers.

**14-19. Message Strategies: Employment Messages** [LO-5] Revise this message so that it follows this chapter's guidelines.

I'm writing to say that I must decline your job offer. Another company has made me a more generous offer, and I have decided to accept. However, if things don't work out for me there, I will let you know. I sincerely appreciate your interest in me.

**14-20. Message Strategies: Employment Messages, Communication Ethics: Resolving Ethical Dilemmas** [LO-5], **Chapter 1** You have decided to accept a new position with a competitor of your company. Write a letter of resignation to your supervisor, announcing your decision. In an email message to your instructor, address the following questions:

- Will you notify your employer that you are joining a competing firm? Explain.
- Will you use the direct or indirect approach? Explain.
- Will you send your letter by email, send it by regular mail, or place it on your supervisor's desk?

## Expand Your Skills

### Critique the Professionals

Find an online video of a business professional being interviewed by a journalist. Using whatever medium your instructor requests, write a brief assessment (no more than one page) of the professional's performance and any tips that you picked up that you could use in job interviews.

### Sharpen Your Career Skills Online

Bovée and Thill's Business Communication Web Search, at **http://websearch.businesscommunicationnetwork.com**, is a unique research tool designed specifically for business communication research. Use the Web Search function to find a website, video, PDF document, podcast, or presentation that offers advice on successful interviewing techniques. Write a brief email message to your instructor or a post for your class blog describing the item that you found and summarizing the career skills information you learned from it.

# Cases

Website links for selected companies mentioned in cases can be found in the Student Assignments section at **http://real-timeupdates.com/bce7**.

### Writing Application Letters

#### EMAIL SKILLS

**14-21. Message Strategies: Employment Messages [LO-1]**
Use one of the websites listed in Table 13.1 on page 386 to find a job opening in your target profession. If you haven't narrowed down to one career field yet, choose a business job for which you will have at least some qualifications at the time of your graduation.

**Your task:** Write an email message that would serve as your application letter if you were to apply for this job. Base your message on your actual qualifications for the position, and be sure to "echo" the requirements listed in the job description. Include the job description in your email message when you submit it to your instructor.

#### MICROBLOGGING SKILLS

**14-22. Message Strategies: Employment Messages [LO-1]**
If you want to know whether job candidates can express themselves clearly on Twitter, why not test them as part of the application process? That's exactly what the Minneapolis advertising agency Campbell Mithun does. Rather than having intern candidates use conventional application methods, the company asks them to tweet their applications in 13 messages.[49]

**Your task:** Find a job opening on Twitter by searching on any of the following hashtags: #hiring, #joblisting, or #nowhiring.[50] Next, write an "application letter" composed of 13 individual tweets (140 characters maximum). If your class is set up with private Twitter accounts, go ahead and send the tweets. Otherwise, email them to your instructor or post them on your class blog, as your instructor indicates.

#### EMAIL SKILLS

**14-23. Message Strategies: Employment Messages [LO-1]**
Finding job openings that align perfectly with your professional interests is wonderful, but it doesn't always happen. Sometimes you have to widen your search and go after whatever opportunities happen to be available. Even when the opportunity is not ideal, however, you still need to approach the employer with enthusiasm and a focused, audience-centric message.

**Your task:** Find a job opening for which you will be qualified when you graduate (or close to being qualified, for the purposes of this activity), but make it one that is outside your primary field of interest. Write an email application letter for this opening, making a compelling case that you are the right candidate for this job.

### Interviewing

#### BLOGGING SKILLS/TEAM SKILLS

**14-24. Career Management: Researching Target Employers [LO-3]** Research is a critical element of the job-search process. With information in hand, you increase the chance of finding the right opportunity (and avoiding bad choices), and you impress interviewers in multiple ways by demonstrating initiative, curiosity, research and analysis skills, an appreciation for the complex challenges of running a business, and willingness to work to achieve results.

**Your task:** With a small team of classmates, use online job listings to identify an intriguing job opening that at least one member of the team would seriously consider pursuing as graduation approaches. (You'll find it helpful if the career is related to at least one team member's college major or on-the-job experience so that the team can benefit from some knowledge of the profession in question.) Next, research the company, its competitors, its markets, and this specific position to identify five questions that would (1) help the team member decide if this is a good opportunity and (2) show an interviewer that you've really done your homework. Go beyond the basic and obvious questions to identify current, specific, and complex issues that only deep research can uncover. For example, is the company facing significant technical, financial, legal, or regulatory challenges that threaten its ability to grow or perhaps even survive in the long term? Or is the market evolving in a way that positions this particular company for dramatic growth? In a post for your class blog, list your five questions, identify how you uncovered the issue, and explain why each is significant.

### TEAM SKILLS

**14-25. Career Management: Interviewing [LO-4]** Interviewing is a skill that can be improved through observation and practice.

**Your task:** You and all other members of your class are to write letters of application for an entry-level or management-trainee position that requires an engaging personality and intelligence but a minimum of specialized education or experience. Sign your letter with a fictitious name that conceals your identity. Next, polish (or create) a résumé that accurately identifies you and your educational and professional accomplishments.

Now, three members of the class who volunteer as interviewers divide up all the anonymously written application letters. Then each interviewer selects a candidate who seems the most convincing in his or her letter. At this time, the selected candidates identify themselves and give the interviewers their résumés.

Each interviewer then interviews his or her chosen candidate in front of the class, seeking to understand how the items on the résumé qualify the candidate for the job. At the end of the interviews, the class decides who gets the job and discusses why this candidate was successful. Afterward, retrieve your letter, sign it with the right name, and submit it to the instructor for credit.

### TEAM SKILLS

**14-26. Career Management: Interviewing [LO-4]** Select a company in an industry in which you might like to work and then identify an interesting position within the company. Study the company and prepare for an interview with that company.

**Your task:** Working with a classmate, take turns interviewing each other for your chosen positions. Interviewers should take notes during the interview. When the interview is complete, critique each other's performance. (Interviewers should critique how well candidates prepared for the interview and answered the questions; interviewees should critique the quality of the questions asked.) Write a follow-up letter thanking your interviewer and submit the letter to your instructor.

#### Following Up After an Interview

### LETTER WRITING SKILLS

**14-27. Message Strategies: Employment Messages [LO-5]** Because of a mix-up in your job application scheduling, you accidentally applied for your third-choice job before going after the one you really wanted. What you want to do is work in retail marketing with the upscale department store Neiman Marcus in Dallas; what you have been offered is a job with Longhorn Leather and Lumber, 65 miles away in the small town of Commerce, Texas.

You review your notes. Your Longhorn interview was three weeks ago with the human resources manager, R. P. Bronson, who has just written to offer you the position. The store's address is 27 Sam Rayburn Drive, Commerce, TX 75428. Mr. Bronson notes that he can hold the position open for 10 days. You have an interview scheduled with Neiman Marcus next week, but it is unlikely that you will know the store's decision within this 10-day period.

**Your task:** Write to Mr. Bronson, requesting a reasonable delay in your consideration of his job offer.

### LETTER WRITING SKILLS/EMAIL SKILLS

**14-28. Message Strategies: Employment Messages [LO-5]** Fortunately for you, your interview with Neiman Marcus (see the previous case) went well, and you've just received a job offer from the company.

**Your task:** Write a letter to R. P. Bronson at Longhorn Leather and Lumber, declining his job offer, and write an email message to Clarissa Bartle at Neiman Marcus, accepting her job offer. Make up any information you need when accepting the Neiman Marcus offer.

## Improve Your Grammar, Mechanics, and Usage

You can download the text of this assignment from http://real-timeupdates.com/bce7; click on Student Assignments and then click on Chapter 14. Improve Your Grammar, Mechanics, and Usage.

#### Level 1: Self-Assessment—Vocabulary

Review Sections 4.1, 4.2, and 4.3 in the Handbook of Grammar, Mechanics, and Usage. For the following items, indicate the correct word provided in parentheses.

**14-29.** Everyone (accept/except) Barbara King has registered for the company competition.

**14-30.** We need to find a new security (device/devise).

**14-31.** The Jennings are (loath/loathe) to admit that they are wrong.
**14-32.** The judge has ruled that this town cannot enforce such a local (ordinance/ordnance).
**14-33.** To stay on schedule, we must give (precedence/precedents) to the Marley project.
**14-34.** This month's balance is greater (than/then) last month's.
**14-35.** That decision lies with the director, (who's/whose) in charge of this department.

For the following items, correct any errors you find:

**14-36.** In this department, we see alot of mistakes like that.
**14-37.** In my judgement, you'll need to redo the cover.
**14-38.** He decided to reveal the information, irregardless of the consequences.
**14-39.** Why not go along when it is so easy to accomodate his demands?
**14-40.** When you say that, do you mean to infer that I'm being unfair?
**14-41.** She says that she finds this sort of ceremony embarassing.
**14-42.** All we have to do is try and get along with him for a few more days.
**14-43.** A friendly handshake should always preceed negotiations.

### Level 2: Workplace Applications

The following items may contain errors in grammar, capitalization, punctuation, abbreviation, number style, word division, and vocabulary. Rewrite each sentence, correcting all errors. If a sentence has no errors, write "Correct" for that number.

**14-44.** An entrepreneur and their business, are so closely tied together that a bank will want to see how they handle their personal affairs, before granting a small business line of credit.
**14-45.** The companys' annual meeting will be held from 2–4 PM on May 3d in the Santa Fe room at the Marriott hotel.
**14-46.** Well over four hundred outstanding students from coast-to-coast, have realized their dreams of a college education thanks to the NASE Scholarship program.
**14-47.** If you're home is you're principle place of business you can deduct generally the cost of traveling from you're home, to any business destination.
**14-48.** Companies like McLeod USA sprung into being in the 1990's to provide cut rate phone services to small- and medium-size businesses in competition with the established baby bells.
**14-49.** Some question whether a 'new economy' exists and if so how it differs from the old economy?
**14-50.** When the music industry claimed by stealing intellectual property Napster were committing piracy Napster argued that it was'nt doing anything illegal or un-ethical.
**14-51.** The World Bank plays an important roll in todays fast changing closely-meshed global economy.
**14-52.** When it comes to consumer rights the F.D.A., F.T.C., and Agriculture department are concerned not only with safety but also accurate information.
**14-53.** Fujitsu, a \$50 billion company with 190,000 employees, dominates the Japanese computer industry.
**14-54.** The fortune 500 ranks not only corporations by size but also offers brief company descriptions; along with industry statistics, and additional measures of corporate performance.
**14-55.** Having bought 55 companies over the past decade, plans to make ten to 15 new acquisitions each year are being made by Cisco Systems.
**14-56.** In 1984 Michael Dell decided to sell P.C.'s direct and built to order, now everybody in the industry are trying to imitate Dells' strategy.
**14-57.** Resulting in large cost savings for the company, American Express have reduced the number of field office's from 85 to 7 by using virtual teams.
**14-58.** In Europe and Asia, people are using mobile phones to send text messages to other users; exchange email; read the morning news; surfing certain websites; and to make purchases such as movie tickets and charge it to they're monthly phone bill.

### Level 3: Document Critique

The following document may contain errors in grammar, capitalization, punctuation, abbreviation, number style, word division, and vocabulary. As your instructor indicates, photocopy this page and correct all errors using standard proofreading marks (see Appendix C) or download the document and make the corrections in your word-processing software.

Morgan Mitras
2397 Glencrest ridge, Fort Worth, TEX 76119
(817/ 226-1804)
February 2 2015:

Norton Acctg. Group
Ms Nancy Remington, Human Resources
3778 Parkway North
Indianapolis, Indiana 46205

Dear Ms. Remington—

With your companys' reputation for quality, customer service, employee empowerment, you'll will want to hire someone who is not only accurrate and efficient but also self motivated and results-oriented—someone who is able to make decisions as well as coperate with team members and clients. The ad you placed in the February 1st issue of The Wall Street Journal for someone to fill a financial management position really has me very excited and eager.

During my 3 years at Tandy corporation see attached résumé- I've conducted internal auditing for accounts valued at \$450 million dollars. Some of my many, countless accomplishments include

- Increasing both internal and client support for the auditing process
- I save the company over 2.5 million dollars when I discovered billing errors
- Suggest ways accounts receivable processes could be streamlined

In addition it might be that Norton Accounting may appreciate my ability to complete projects on time as well as keeping them under budget. One of my priorities is a position in which my expereince will be broaden: so any opportunity to travel would be welcomed by me!

I'll be in your area during the weak of February 20; I'll call your office on Feb. 8 to see whether we can arrange to meet. I hope you'll give me a chance, please.

Sincerely,
Morgan Mitras,
Applicant

MyBCommLab

Go to **mybcommlab.com** for the following Assisted-graded writing questions:

**14-59.** How can you prepare for a situational or behavioral interview if you have no experience with the job for which you are interviewing? [LO-2]

**14-60.** Why are the questions you ask during an interview as important as the answers you give to the interviewer's questions? [LO-3]

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# A Format and Layout of Business Documents

The format and layout of business documents vary from country to country. In addition, many organizations develop their own variations of standard styles, adapting documents to the types of messages they send and the kinds of audiences they communicate with. The formats described here are the most common approaches used in U.S. business correspondence, but be sure to follow whatever practices are expected at your company.

## First Impressions

Your documents tell readers a lot about you and about your company's professionalism. So all your documents must look neat, present a professional image, and be easy to read. Your audience's first impression of a document comes from the quality of its paper, the way it is customized, and its general appearance.

### PAPER

To give a quality impression, businesspeople consider carefully the paper they use. Several aspects of paper contribute to the overall impression:

- **Weight.** Paper quality is judged by the weight of four reams (each a 500-sheet package) of letter-size paper. The weight most commonly used by U.S. business organizations is 20-pound paper, but 16- and 24-pound versions are also used.
- **Cotton content.** Paper quality is also judged by the percentage of cotton in the paper. Cotton doesn't yellow over time the way wood pulp does, plus it's both strong and soft. For letters and outside reports, use paper with a 25 percent cotton content. For memos and other internal documents, you can use a lighter-weight paper with lower cotton content. Airmail-weight paper may save money for international correspondence, but make sure it isn't too flimsy.[1]
- **Size.** In the United States, the standard paper size for business documents is 8 1/2 by 11 inches. Standard legal documents are 8 1/2 by 14 inches. Executives sometimes have heavier 7-by-10-inch paper on hand (with matching envelopes) for personal messages such as congratulations.[2] They may also have a box of note cards imprinted with their initials and a box of plain folded notes for condolences or for acknowledging formal invitations.
- **Color.** White is the standard color for business purposes, although neutral colors such as gray and ivory are sometimes used. Memos can be produced on pastel-colored paper to distinguish them from external correspondence. In addition, memos are sometimes produced on various colors of paper for routing to separate departments. Light-colored papers are appropriate, but bright or dark colors make reading difficult and may appear too frivolous.

### CUSTOMIZATION

For letters to outsiders, U.S. businesses commonly use letterhead stationery, which may be either professionally printed or designed in-house using word-processing templates and graphics. Letterhead typically contains the company name, logo, address, telephone and fax numbers, general email address, website URL, and possibly one or more social media URLs.

In the United States, businesses always use letterhead for the first page of a letter. Successive pages are usually plain sheets of paper that match the letterhead in color and quality. Some companies use a specially printed second-page letterhead that bears only the company's name.

### APPEARANCE

Nearly all business documents are produced using an ink-jet or laser printer; make sure to use a clean, high-quality printer. Certain documents, however, should be handwritten (such as a short informal memo or a note of condolence). Be sure to handwrite, print, or type the envelope to match the document. However, even a letter on the best-quality paper with the best-designed letterhead may look unprofessional if it's poorly produced. So pay close attention to all the factors affecting appearance, including the following:

- **Margins.** Business letters typically use 1-inch margins at the top, bottom, and sides of the page, although these parameters are sometimes adjusted to accommodate letterhead elements.
- **Line length.** Lines are rarely justified, because the resulting text looks too formal and can be difficult to read.
- **Character spacing.** Use proper spacing between characters and after punctuation. For example, U.S. conventions include leaving one space after commas, semicolons, colons, and sentence-ending periods. Each letter in a person's initials is followed by a period and a single space. However, abbreviations such as U.S.A. or MBA may or may not have periods, but they never have internal spaces.

- **Special symbols.** Take advantage of the many special symbols available with your computer's selection of fonts. In addition, see if your company has a style guide for documents, which may include particular symbols you are expected to use.
- **Corrections.** Messy corrections are unacceptable in business documents. If you notice an error after printing a document with your word processor, correct the mistake and reprint. (With informal memos to members of your own team or department, the occasional small correction in pen or pencil is acceptable, but never in formal documents.)

# Letters

All business letters have certain elements in common. Several of these elements appear in every letter; others appear only when desirable or appropriate. In addition, these letter parts are usually arranged in one of three basic formats.

## STANDARD LETTER PARTS

The letter in Figure A.1 shows the placement of standard letter parts. The writer of this business letter had no letterhead available but correctly included a heading. All business letters typically include these seven elements.

### Heading

The elements of the letterhead make up the heading of a letter in most cases. If letterhead stationery is not available, the heading includes a return address (but no name) and starts 13 lines from the top of the page, which leaves a 2-inch top margin.

### Date

If you're using letterhead, place the date at least one blank line beneath the lowest part of the letterhead. Without letterhead, place the date immediately below the return address. The standard method of writing the date in the United States uses the full name of the month (no abbreviations), followed

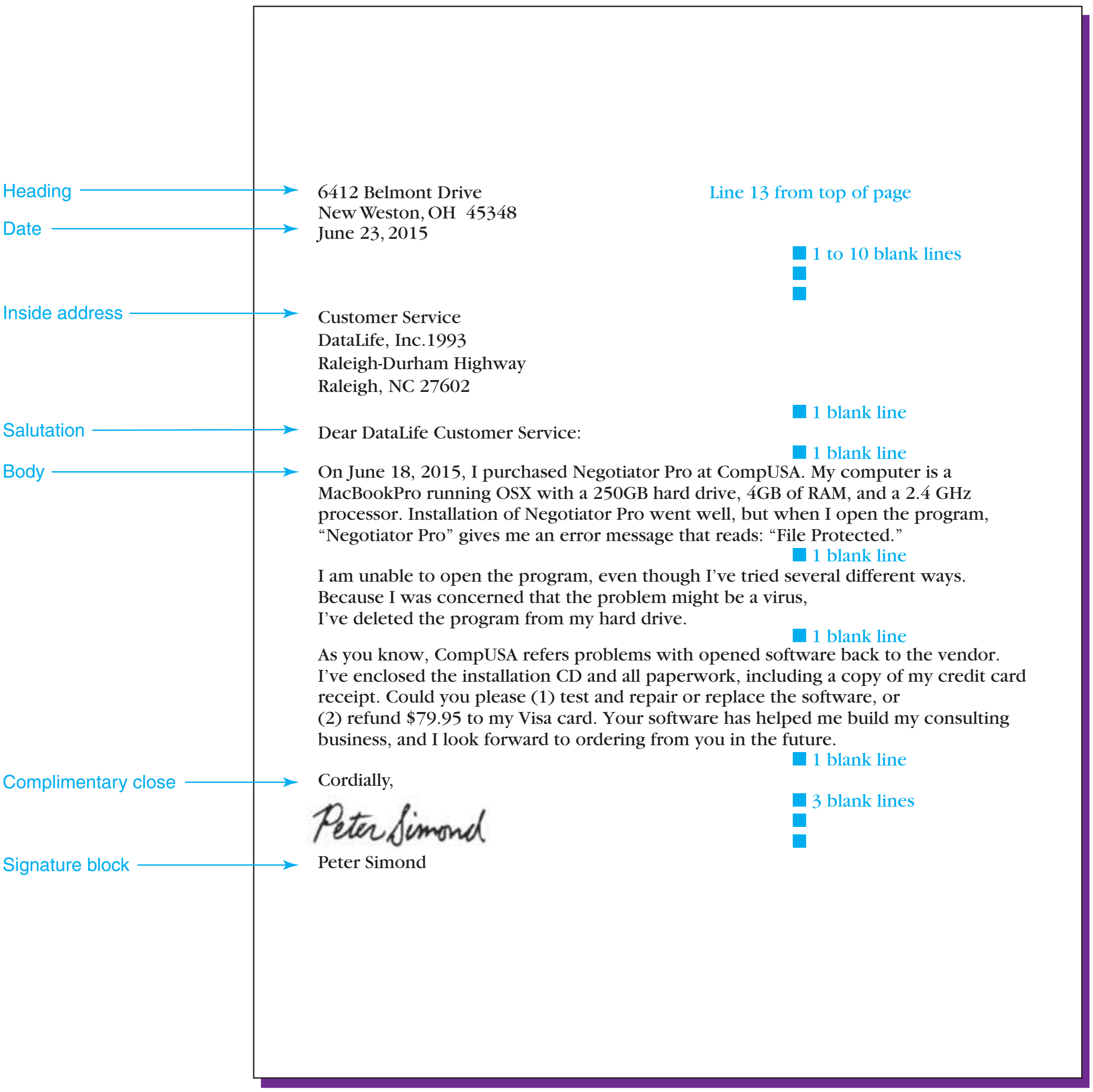



**Figure A.1** **Standard Letter Parts**

TABLE A.1 **Common Date Forms**

| Convention | Order | Examples |
|---|---|---|
| U.S. standard | Month day year | July 31, 2015<br>7/31/2015<br>7-31-2015 |
| Japan | Year month day | 15/07/31 |
| Europe (most countries) | Day month year | 31 July 2015<br>31/07/15<br>31.07.15 |
| International (ISO) format | Year month day | 2015-07-31 |

by the day (in numerals, without *st*, *nd*, *rd*, or *th*), a comma, and then the year: July 31, 2015 (7/31/2015). Many other countries use other formats (see Table A.1), which can create confusion in international correspondence. To avoid misinterpretation in such cases, spell out the month.[3]

## Inside Address

The inside address identifies the recipient of the letter. For U.S. correspondence, begin the inside address at least one line below the date. Precede the addressee's name with a courtesy title, such as *Dr., Mr.*, or *Ms.* The accepted courtesy title for women in business is *Ms.*, although a woman known to prefer the title *Miss* or *Mrs.* is always accommodated. If you don't know whether a person is a man or a woman (and you have no way of finding out), omit the courtesy title. For example, *Terry Smith* could be either a man or a woman. The first line of the inside address would be just *Terry Smith*, and the salutation would be *Dear Terry Smith*. The same is true if you know only a person's initials, as in *S. J. Adams*.

Spell out and capitalize titles that precede a person's name, such as *Professor* or *General* (see Table A.2 on the next page for the proper forms of address). The person's organizational title, such as *Director*, may be included on this first line (if it is short) or on the line below; the name of a department may follow. In addresses and signature lines, don't forget to capitalize any professional title that follows a person's name:

Mr. Ray Johnson, Dean
Ms. Patricia T. Higgins
Assistant Vice President

However, professional titles not appearing in an address or signature line are capitalized only when they directly precede the name:

President Kenneth Johanson will deliver the speech.

Maria Morales, president of ABC Enterprises, will deliver the speech.

The Honorable Helen Masters, senator from Arizona, will deliver the speech.

If the name of a specific person is unavailable, you may address the letter to the department or to a specific position within the department. Also, be sure to spell out company names in full, unless the company itself uses abbreviations in its official name.

Other address information includes the treatment of buildings, house numbers, and compass directions (see Table A.3 on page 401). The following example shows all the information that may be included in the inside address and its proper order for U.S. correspondence:

Ms. Linda Coolidge, Vice President
Corporate Planning Department
Midwest Airlines
Kowalski Building, Suite 21-A
7279 Bristol Ave.
Toledo, OH 43617

Canadian addresses are similar, except that the name of the province is usually spelled out:

Dr. H. C. Armstrong
Research and Development
Commonwealth Mining Consortium
The Chelton Building, Suite 301
585 Second St. SW
Calgary, Alberta T2P 2P5

The order and layout of address information vary from country to country. So when addressing correspondence for other countries, carefully follow the format and information that appear in the company's letterhead. However, when you're sending mail from the United States, be sure that the name of the destination country appears on the last line of the address in capital letters. Use the English version of the country name so that your mail is routed from the United States to the right country. Then, to be sure your mail is routed correctly within the destination country, use the foreign spelling of the city name (using the characters and diacritical marks that would be commonly used in the region). For example, the following address uses *Köln* instead of *Cologne*:

**TABLE A.2 Forms of Address**

| Person | In Address | In Salutation |
|---|---|---|
| **Personal Titles** | | |
| Man | Mr. [first & last name] | Dear Mr. [last name]: |
| Woman* | Ms. [first & last name] | Dear Ms. [last name]: |
| Two men (or more) | Mr. [first & last name] and Mr. [first & last name] | Dear Mr. [last name] and Mr. [last name] *or* Messrs. [last name] and [last name]: |
| Two women (or more) | Ms. [first & last name] and Ms. [first & last name] | Dear Ms. [last name] and Ms. [last name] *or* Mses. [last name] and [last name]: |
| One woman and one man | Ms. [first & last name] and Mr. [first & last name] | Dear Ms. [last name] and Mr. [last name]: |
| Couple (married with same last name) | Mr. [husband's first name] and Mrs. [wife's first name] [couple's last name] | Dear Mr. and Mrs. [last name]: |
| Couple (married with different last names) | Mr. [first & last name of husband] Ms. [first & last name of wife] | Dear Mr. [husband's last name] and Ms. [wife's last name]: |
| Couple (married professionals with same title and same last name) | [title in plural form] [husband's first name] and [wife's first name] [couple's last name] | Dear [title in plural form] [last name]: |
| Couple (married professionals with different titles and same last name) | [title] [first & last name of husband] and [title] [first & last name of wife] | Dear [title] and [title] [last name]: |
| **Professional Titles** | | |
| President of a college or university | [title] [first & last name], President | Dear [title] [last name]: |
| Dean of a school or college | Dean [first & last name] *or* Dr., Mr., *or* Ms. [first & last name], Dean of [title] | Dear Dean [last name]: *or* Dear Dr., Mr., *or* Ms. [last name]: |
| Professor | Professor *or* Dr. [first & last name] | Dear Professor *or* Dr. [last name]: |
| Physician | [first & last name], M.D. | Dear Dr. [last name]: |
| Lawyer | Mr. *or* Ms. [first & last name], Attorney at Law | Dear Mr. *or* Ms. [last name]: |
| Military personnel | [full rank, first & last name, abbreviation of service designation] (add *Retired* if applicable) | Dear [rank] [last name]: |
| Company or corporation | [name of organization] | Ladies and Gentlemen: *or* Gentlemen and Ladies: |
| **Governmental Titles** | | |
| President of the United States | The President | Dear Mr. *or* Madam President: |
| Senator of the United States | The Honorable [first & last name] | Dear Senator [last name]: |
| Cabinet member | The Honorable [first & last name] | Dear Mr. *or* Madam Secretary: |
| Attorney General | The Honorable [first & last name] | Dear Mr. *or* Madam Attorney General: |
| Mayor | The Honorable [first & last name], Mayor of [name of city] | Dear Mayor [last name]: |
| Judge | The Honorable [first & last name] | Dear Judge [last name]: |

*Use *Mrs.* or *Miss* only if the recipient has specifically requested that you use one of these titles; otherwise *always* use *Ms.* in business correspondence. Also, never refer to a married woman by her husband's name (e.g., Mrs. Robert Washington) unless she specifically requests that you do so.

| | |
|---|---|
| H. R. Veith, Director | Addressee |
| Eisfieren Glaswerk | Company name |
| Blaubachstrasse 13 | Street address |
| Postfach 10 80 07 | Post office road |
| D-5000 Köln I | District, city |
| GERMANY | Country |

Be sure to use organizational titles correctly when addressing international correspondence. Job designations vary around the world. In England, for example, a managing director is often what a U.S. company would call its chief executive officer or president, and a British deputy is the equivalent of a vice president. In France, responsibilities are assigned to individuals without regard to title or organizational structure, and in China the title *project manager* has meaning, but the title *sales manager* may not.

In addition, be aware that businesspeople in some countries sign correspondence without their names typed below.

TABLE A.3 **Inside Address Information**

| Description | Example |
|---|---|
| Capitalize building names. | Empire State Building |
| Capitalize locations within buildings (apartments, suites, rooms). | Suite 1073 |
| Use numerals for all house or building numbers, except the number one. | One Trinity Lane; 637 Adams Ave., Apt. 7 |
| Spell out compass directions that fall within a street address. | 1074 West Connover St. |
| Abbreviate compass directions that follow the street address. | 783 Main St., N.E., Apt. 27 |

In Germany, for example, the belief is that employees represent the company, so it's inappropriate to emphasize personal names.[4] See the Real-Time Updates Learn More item on this page for a website that offers guidelines and examples for addressing correspondence to countries outside the United States.

**REAL-TIME UPDATES**
LEARN MORE BY VISITING THIS WEBSITE
**Addressing international correspondence**
The Universal Postal Union offers examples for most countries around the world. Go to **http://real-timeupdates.com/bce7**. Under "Students," click on "Learn More."

## Salutation

In the salutation of your letter, follow the style of the first line of the inside address. If the first line is a person's name, the salutation is *Dear Mr.* or *Ms. Name*. The formality of the salutation depends on your relationship with the addressee. If in conversation you would say "Mary," your letter's salutation should be *Dear Mary*, followed by a colon. Otherwise, include the courtesy title and last name, followed by a colon. Presuming to write *Dear Lewis* instead of *Dear Professor Chang* demonstrates a disrespectful familiarity that the recipient will probably resent.

If the first line of the inside address is a position title such as *Director of Personnel*, then use *Dear Director*. If the addressee is unknown, use a polite description, such as *Dear Alumnus, Dear SPCA Supporter*, or *Dear Voter*. If the first line is plural (a department or company), then use *Ladies and Gentlemen* (look again at Table A.2). When you do not know whether you're writing to an individual or a group (for example, when writing a reference or a letter of recommendation), use *To whom it may concern*.

In the United States some letter writers use a "salutopening" on the salutation line. A salutopening omits *Dear* but includes the first few words of the opening paragraph along with the recipient's name. After this line, the sentence continues a double space below as part of the body of the letter, as in these examples:

| | |
|---|---|
| Thank you, Mr. Brown, for your prompt payment of your bill. | Salutopening |
| Your payment of $88.13 was received on January 24, 2014. | Body |

Whether your salutation is informal or formal, be especially careful that names are spelled correctly. A misspelled name is glaring evidence of carelessness, and it belies the personal interest you're trying to express.

## Body

The body of the letter is your message. Almost all letters are single-spaced, with one blank line before and after the salutation or salutopening, between paragraphs, and before the complimentary close. The body may include indented lists, entire paragraphs indented for emphasis, and even subheadings. If it does, all similar elements should be treated in the same way. Your department or company may select a format to use for all letters.

## Complimentary Close

The complimentary close begins on the second line below the body of the letter. Alternatives for wording are available, but currently the trend seems to be toward using one-word closes, such as *Sincerely* and *Cordially*. In any case, the complimentary close reflects the relationship between you and the person you're writing to. Avoid cute closes, such as *Yours for bigger profits*. If your audience doesn't know you well, your sense of humor may be misunderstood.

## Signature Block

Leave three blank lines for a written signature below the complimentary close, and then include the sender's name (unless it appears in the letterhead). The person's title may appear on the same line as the name or on the line below:

Cordially,

Raymond Dunnigan
Director of Personnel

Your letterhead indicates that you're representing your company. However, if your letter is on plain paper or runs to a second page, you may want to emphasize that you're speaking legally for the company. The accepted way of doing that is to place the company's name in capital letters, a double space below the complimentary close, and then include the sender's name and title four lines below that:

> Sincerely,
>
> WENTWORTH INDUSTRIES
>
> Helen B. Taylor
>
> President

If your name could be taken for either a man's or a woman's, a courtesy title indicating gender should be included, with or without parentheses. Also, women who prefer a particular courtesy title should include it:

> Mrs. Nancy Winters
> (Ms.) Juana Flores
> Ms. Pat Li
> (Mr.) Jamie Saunders

## ADDITIONAL LETTER PARTS

Letters vary greatly in subject matter and thus in the identifying information they need and the format they adopt. The letter in Figure A.2 on the next page shows how these additional parts should be arranged. The following elements may be used in any combination, depending on the requirements of the particular letter:

- **Addressee notation.** Letters that have a restricted readership or that must be handled in a special way should include such addressee notations as *PERSONAL, CONFIDENTIAL, or PLEASE FORWARD*. This sort of notation appears a double space above the inside address, in all-capital letters.
- **Attention line.** Although not commonly used today, an attention line can be used if you know only the last name of the person you're writing to. It can also direct a letter to a position title or department. Place the attention line on the first line of the inside address and put the company name on the second.[5] Match the address on the envelope with the style of the inside address. An attention line may take any of the following forms or variants of them:

  > Attention Dr. McHenry
  >
  > Attention Director of Marketing
  >
  > Attention Marketing Department

- **Subject line.** The subject line tells recipients at a glance what the letter is about (and indicates where to file the letter for future reference). It usually appears below the salutation, either against the left margin, indented (as a paragraph in the body), or centered. It can be placed above the salutation or at the very top of the page, and it can be underscored. Some businesses omit the word *Subject*, and some organizations replace it with *Re:* or *In re:* (meaning "concerning" or "in the matter of"). The subject line may take a variety of forms, including the following:

  > Subject: RainMaster Sprinklers
  >
  > Re: About your February 2, 2016, order
  >
  > In re: FALL 2015 SALES MEETING
  >
  > Reference Order No. 27920

- **Second-page heading.** Use a second-page heading whenever an additional page is required. Some companies have second-page letterhead (with the company name and address on one line and in a smaller typeface). The heading bears the name (person or organization) from the first line of the inside address, the page number, the date, and perhaps a reference number. Leave two blank lines before the body. Make sure that at least two lines of a continued paragraph appear on the first and second pages. Never allow the closing lines to appear alone on a continued page. Precede the complimentary close or signature lines with at least two lines of the body. Also, don't hyphenate the last word on a page. All the following are acceptable forms for second-page headings:

  > Ms. Melissa Baker
  >
  > May 10, 2016
  >
  > Page 2
  >
  > Ms. Melissa Baker, May 10, 2016, Page 2
  >
  > Ms. Melissa Baker-2-May 10, 2016

- **Company name.** If you include the company's name in the signature block, put it a double space below the complimentary close. You usually include the company's name in the signature block only when the writer is serving as the company's official spokesperson or when letterhead has not been used.
- **Reference initials.** When businesspeople keyboard their own letters, reference initials are unnecessary, so they are becoming rare. When one person dictates a letter and another person produces it, reference initials show who helped prepare it. Place initials at the left margin, a double space below the signature block. When the signature block includes the writer's name, use only the preparer's initials. If the signature block includes only the department, use both sets of initials, usually in one of the following forms: *RSR/sm*, *RSR:sm*, or *RSR:SM* (writer/preparer). When the writer and the signer are

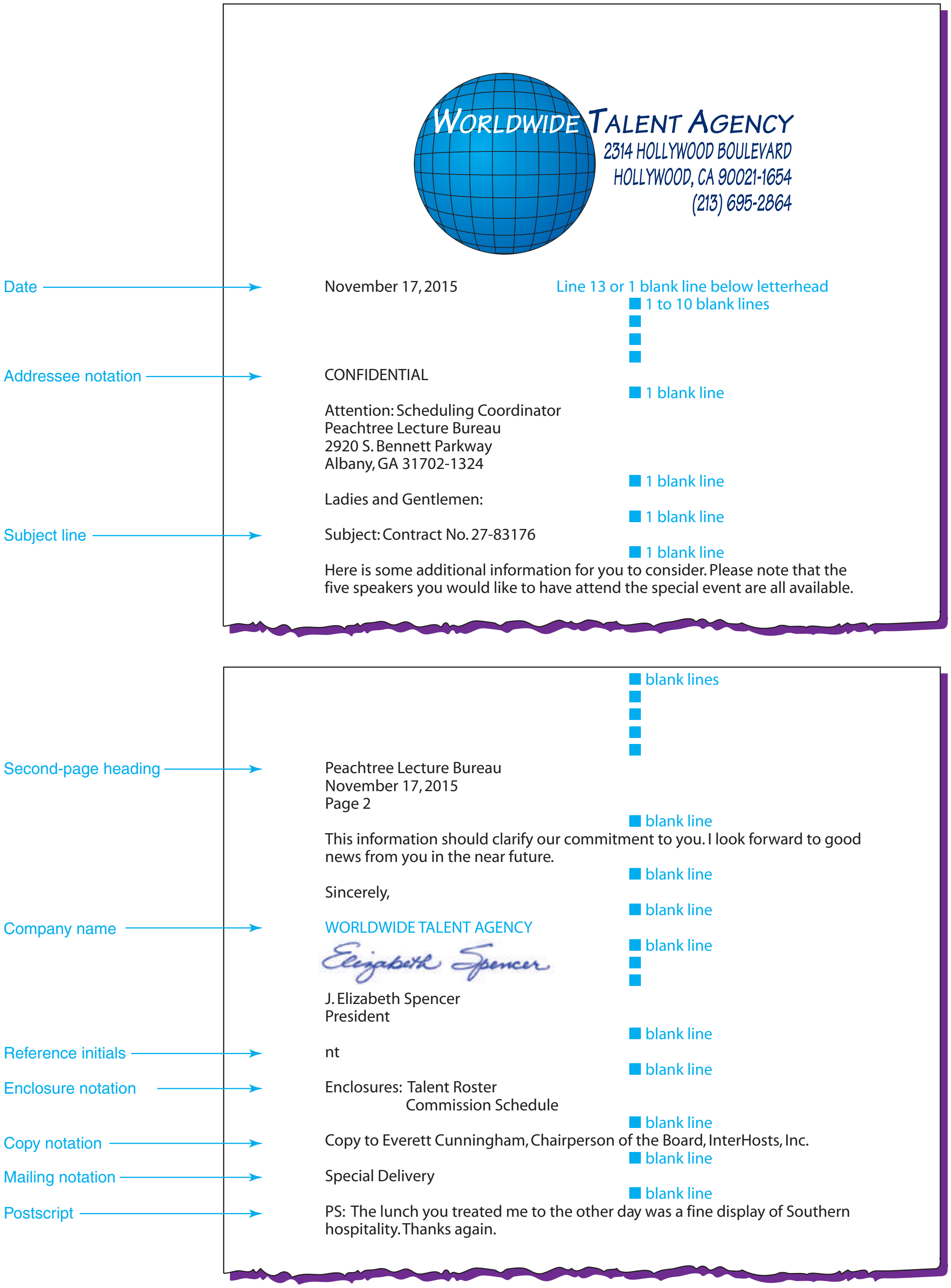



**Figure A.2 Additional Letter Parts**

different people, at least the file copy should bear both their initials as well as the typist's: *JFS/RSR/sm* (signer/writer/preparer).

- **Enclosure notation.** Enclosure notations appear at the bottom of a letter, one or two lines below the reference initials. Some common forms include the following:

Enclosure

Enclosures (2)

Enclosures: Résumé
Photograph
Brochure

- **Copy notation.** Copy notations may follow reference initials or enclosure notations. They indicate who's receiving a *courtesy copy* (*cc*). Recipients are listed in order of rank or (rank being equal) in alphabetical order. Among the forms used are the following:

> cc: David Wentworth, Vice President
> Copy to Hans Vogel
> 748 Chesterton Road
> Snohomish, WA 98290

- **Mailing notation.** You may place a mailing notation (such as *Special Delivery* or *Registered Mail*) at the bottom of the letter, after reference initials or enclosure notations (whichever is last) and before copy notations. Or you may place it at the top of the letter, either above the inside address on the left side or just below the date on the right side. For greater visibility, mailing notations may appear in capital letters.
- **Postscript.** A postscript is presented as an afterthought to the letter, a message that requires emphasis, or a personal note. It is usually the last thing on any letter and may be preceded by *P.S.*, *PS.*, *PS:*, or nothing at all. A second afterthought would be designated *P.P.S.* (post postscript).

## LETTER FORMATS

A letter format is the way of arranging all the basic letter parts. Sometimes a company adopts a certain format as its policy; sometimes the individual letter writer or preparer is allowed to choose the most appropriate format. In the United States, three major letter formats are commonly used:

- **Block format.** Each letter part begins at the left margin. The main advantage is quick and efficient preparation (see Figure A.3).

Delauny Music
56 Commerce Circle • Davenport, IA 52806
(563) 555-4001 • delaunymusic.net

June 21, 2016 — Line 13 or one line below letterhead
1 to 10 blank lines

Ms. Claudia Banks
122 River Heights Drive
Bettendorf, IA 52722
1 blank line

Dear Ms. Banks:
1 blank line

Thank you for your recent purchase. We wish you many years of satisfaction with your new Yamaha CG1 grand piano. The CG1 carries more than a century of Yamaha's heritage in design and production of world-class musical instruments and will give you many years of playing and listening pleasure.
1 blank line

Our commitment to your satisfaction doesn't stop with your purchase, however. As a vital first step, please remember to call us sometime within three to eight months after your piano was delivered to take advantage of the Yamaha Servicebond℠ Assurance Program. This free service program includes a thorough evaluation and adjustment of the instrument after you've had some time to play your piano and your piano has had time to adapt to its environment.
1 blank line

In addition to this important service appointment, a regular program of tuning is essential to ensure your piano's impeccable performance. Our piano specialists recommend four tunings during the first year and two tunings every year thereafter. As your local Yamaha dealer, we are ideally positioned to provide you with optimum service for both regular tuning and any maintenance or repair needs you may have.

Sincerely, — 1 blank line
3 blank lines

Madeline Delauny
Owner
1 blank line

tjr
1 blank line

**Figure A.3 Block Letter Format**

- **Modified block format.** Same as block format, except that the date, complimentary close, and signature block start near the center of the page (see Figure A.4). The modified block format does permit indentions as an option. This format mixes preparation speed with traditional placement of some letter parts. It also looks more balanced on the page than the block format does. (Note: The address and contact information in the left margin of this letter is part of this company's particular stationery design; other designs put this information at the top or bottom of the page.)
- **Simplified format.** Instead of using a salutation, this format often weaves the reader's name into the first line or two of the body and often includes a subject line in capital letters (see Figure A.5 on the next page). This format does not include a complimentary close, so your signature appears immediately below the body text. Because certain letter parts are eliminated, some line spacing is changed.

These three formats differ in the way paragraphs are indented, in the way letter parts are placed, and in some punctuation. However, the elements are always separated by at least one blank line, and the printed name is always separated from the line above by at least three blank lines to allow space for a signature. If paragraphs are indented, the indention is normally five spaces. The most common formats for intercultural business letters are the block style and the modified block style.

In addition to these three letter formats, letters may also be classified according to their style of punctuation. *Standard*, or *mixed, punctuation* uses a colon after the salutation (a comma if the letter is social or personal) and a comma after the complimentary close. *Open punctuation* uses no colon or comma after the salutation or the complimentary close. Although the most popular style in business communication is mixed punctuation, either style of punctuation may be used with block or modified

NORTHWEST COACHLINES

**Charles Redburn**
*Sales Director*

■ line 13 from top of page — November 2, 2015
■ 1 to 10 blank lines
■

Ms. Eugenia Preston, President
Garden Valley High School PTA
P.O. Box 335
Garden Valley, ID 83622
■ 1 blank line
Dear Ms. Preston:
■ 1 blank line

914 W. Front Street
Boise, ID 83701
(208) 747-1121
sales@nwcnet.com

Thank you for inviting us to participate in your "Day of Government" program. So that your honors students can experience state government firsthand, we will be delighted to provide one of our motor coaches next May at a 15% discount to transport up to 40 students and 7 advisers from Garden Valley to Boise and back.
■ 1 blank line
Our buses seat 47 passengers, are fully equipped with restrooms and reclining seats, and are climate controlled for year-round comfort. You can rely on us for your charter transportation needs:
■ 1 blank line
- Our intensive, ongoing driver-training program ensures your safety and satisfaction.
- Our competitive pricing allows us to compete both locally and nationwide.
- Our state-of-the-art maintenance facilities are located in all major U.S. cities to ensure quality, reliability, and excellent service.

■ 1 blank line
Please give me a call at (208) 997-4646 to discuss the specific date of your event, departure times, and the discounted price for your trip. Together, we'll make sure your students have a day that's not only fun and educational but safe and secure. I look forward to hearing from you.
■ 1 blank line

Sincerely,
■ 3 blank lines
■
■

*Charles Redburn*

Charles Redburn
Sales Director
■ 1 blank line
pf
■ 1 blank line
Enclosure

**Figure A.4** **Modified Block Letter Format**

LJT Workplace Solutions

May 5, 2015 — Line 13 from top of page

1 to 10 blank lines

Ms. Gillian Wiles, President
Scientific and Technical Contracts, Inc.
6348 Morehouse Dr.
San Diego, CA 92121

2 blank lines

NEW SERVICES

2 blank lines

Thank you, Ms. Wiles, for your recent inquiry about our services. Our complete line of staffing services offers high-level professionals with the skills you require. From the office to the factory, from the tech site to the trade show, from the law firm to the lab—we can provide you with the people and the expertise you need.

1 blank line

I have enclosed a package of information for your review, including specific information on our engineers, designers/drafters, and engineering support personnel. The package also contains reprints of customer reviews and a comparison sheet showing how our services measure up against those of competing companies. We identify qualified candidates and recruit through a network of professional channels to reach candidates whose skills match the specific engineering disciplines you require.

1 blank line

Please call me with any questions you may have. Whether you need a temporary employee for a day or an entire department staffed indefinitely, our staffing solutions give you the freedom you need to focus and the support you need to succeed. I will be glad to help you fill your staffing needs with Kelly professionals.

3 blank lines

Rudy Cohen

RUDY COHEN
CUSTOMER SERVICE SPECIALIST

1 blank line

jn

1 blank line

Enclosures

999 WEST BIG BEAVER ROAD • TROY, MICHIGAN 48084-4782
TELEPHONE (248) 362-4444

**Figure A.5 Simplified Letter Format**

block letter formats. Because the simplified letter format has no salutation or complimentary close, the style of punctuation is irrelevant.

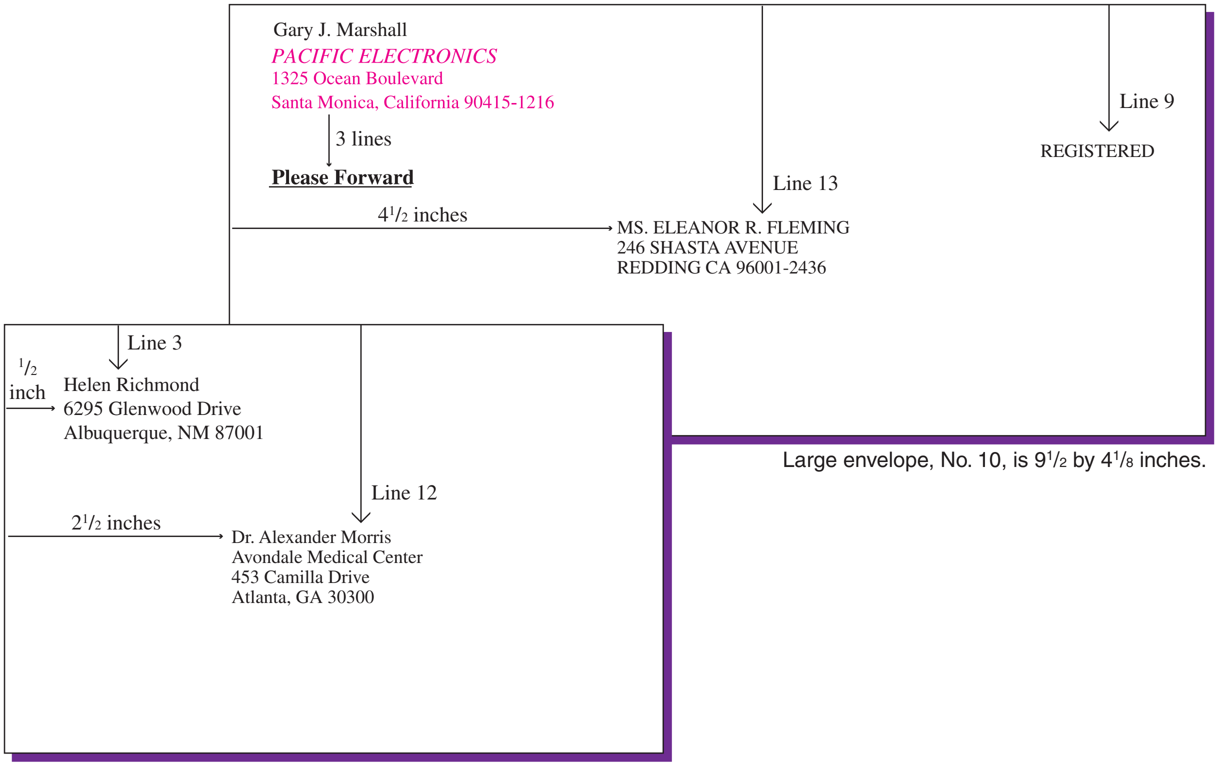
## Envelopes

For a first impression, the quality of the envelope is just as important as the quality of the stationery. Letterhead and envelopes should be of the same paper stock, have the same color ink, and be imprinted with the same address and logo. Most envelopes used by U.S. businesses are No. 10 envelopes (9 ½ inches long), which are sized for an 8 ½-by-11-inch piece of paper folded in thirds. Some occasions call for a smaller, No. 6 ¾, envelope or for envelopes proportioned to fit special stationery. Figure A.6 shows the two most common sizes.

### ADDRESSING THE ENVELOPE

No matter what size the envelope, the address is always single-spaced with all lines aligned on the left. The address on the envelope is in the same style as the inside address and presents the same information. The order to follow is from the smallest division to the largest:

1. Name and title of recipient
2. Name of department or subgroup
3. Name of organization




Large envelope, No. 10, is 9 1/2 by 4 1/8 inches.

Small envelope, No. 6 3/4, is 6 1/2 by 3 5/8 inches.

**Figure A.6 Prescribed Envelope Format**

4. Name of building
5. Street address and suite number, or post office box number
6. City, state, or province, and zip code or postal code
7. Name of country (if the letter is being sent abroad)

Because the U.S. Postal Service uses optical scanners to sort mail, envelopes for quantity mailings, in particular, should be addressed in the prescribed format. Everything is in capital letters, no punctuation is included, and all mailing instructions of interest to the post office are placed above the address area (see Figure A.6). Canada Post requires a similar format, except that only the city is all in capitals, and the postal code is placed on the line below the name of the city. The post office scanners read addresses from the bottom up, so if a letter is to be sent to a post office box rather than to a street address, the street address should appear on the line above the box number. Figure A.6 also shows the proper spacing for addresses and return addresses.

The U.S. Postal Service and the Canada Post Corporation have published lists of two-letter mailing abbreviations for states, provinces, and territories (see Table A.4 on the next page). Postal authorities prefer no punctuation with these abbreviations. Quantity mailings should always follow post office requirements. For other letters, a reasonable compromise is to use traditional punctuation, uppercase and lowercase letters for names and street addresses, but two-letter state or province abbreviations, as shown here:

> Mr. Kevin Kennedy
> 2107 E. Packer Dr.
> Amarillo, TX 79108

Canadian postal codes are alphanumeric, with a three-character "area code" and a three-character "local code" separated by a single space (K2P 5A5). Zip and postal codes should be separated from state and province names by one space. Canadian postal codes may be treated the same or may be positioned alone on the bottom line of the address all by itself.

## FOLDING TO FIT

The way a letter is folded also contributes to the recipient's overall impression of your organization's professionalism. When sending a standard-size piece of paper in a No. 10 envelope, fold it in thirds, with the bottom folded up first and the top folded down over it (see Figure A.7 on the next page); the open end should be at the top of the envelope and facing out. Fit smaller stationery neatly into the appropriate envelope simply by folding it in half or in thirds. When sending a standard-size letterhead in a No. 6 ¾ envelope, fold it in half from top to bottom and then in thirds from side to side.

## INTERNATIONAL MAIL

Postal service differs from country to country, so it's always a good idea to investigate the quality and availability of various

**TABLE A.4 Two-Letter Mailing Abbreviations for the United States and Canada**

| State/Territory/ Province | Abbreviation | State/Territory/ Province | Abbreviation | State/Territory/ Province | Abbreviation |
|---|---|---|---|---|---|
| **United States** | | Massachusetts | MA | Tennessee | TN |
| Alabama | AL | Michigan | MI | Texas | TX |
| Alaska | AK | Minnesota | MN | Utah | UT |
| American Samoa | AS | Mississippi | MS | Vermont | VT |
| Arizona | AZ | Missouri | MO | Virginia | VA |
| Arkansas | AR | Montana | MT | Virgin Islands | VI |
| California | CA | Nebraska | NE | Washington | WA |
| Canal Zone | CZ | Nevada | NV | West Virginia | WV |
| Colorado | CO | New Hampshire | NH | Wisconsin | WI |
| Connecticut | CT | New Jersey | NJ | Wyoming | WY |
| Delaware | DE | New Mexico | NM | **Canada** | |
| District of Columbia | DC | Maryland | MD | Alberta | AB |
| Florida | FL | New York | NY | British Columbia | BC |
| Georgia | GA | North Carolina | NC | Manitoba | MB |
| Guam | GU | North Dakota | ND | New Brunswick | NB |
| Hawaii | HI | Northern Mariana | MP | Newfoundland and Labrador | NL |
| Idaho | ID | Ohio | OH | Northwest Territories | NT |
| Illinois | IL | Oklahoma | OK | Nova Scotia | NS |
| Indiana | IN | Oregon | OR | Nunavut | NU |
| Iowa | IA | Pennsylvania | PA | Ontario | ON |
| Kansas | KS | Puerto Rico | PR | Prince Edward Island | PE |
| Kentucky | KY | Rhode Island | RI | Quebec | QC |
| Louisiana | LA | South Carolina | SC | Saskatchewan | SK |
| Maine | ME | South Dakota | SD | Yukon Territory | YT |

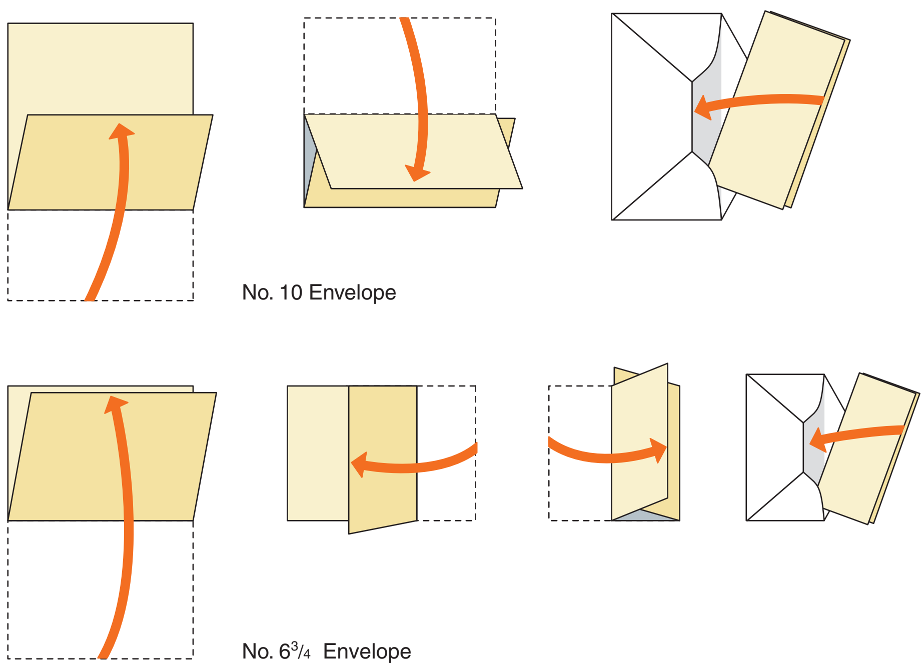



**Figure A.7 Folding Standard-Size Letterhead**

services before sending messages and packages internationally. Also, compare the services offered by delivery companies such as UPS and FedEx to find the best rates and options for each destination and type of shipment. No matter which service you choose, be aware that international mail requires more planning than domestic mail. For example, for anything beyond simple letters, you generally need to prepare *customs forms* and possibly other documents, depending on the country of destination and the type of shipment. You are responsible for following the laws of the United States and any countries to which you send mail and packages.

The U.S. Postal Service currently offers four classes of international delivery, listed here from the fastest (and most expensive) to the slowest (and least expensive):

- **Global Express Guaranteed** is the fastest option. This service, offered in conjunction with FedEx, provides delivery in one to three business days to more than 190 countries and territories.
- **Express Mail International** guarantees delivery in three to five business days to a limited number of countries, including Australia, China, Hong Kong, Japan, and South Korea.
- **Priority Mail International** offers delivery guarantees of 6 to 10 business days to more than 190 countries and territories.
- **First Class Mail International** is an economical way to send correspondence and packages weighing up to four pounds to virtually any destination worldwide.

To prepare your mail for international delivery, follow the instructions provided at the U.S. Postal Service website. There you'll find complete information on the international services available through the USPS, along with advice on addressing and packaging mail, completing customs forms, and calculating postage rates and fees. The *International Mail Manual*, also available on this website, offers the latest information and regulations for both outbound and inbound international mail. For instance, you can click on individual country names to see current information about restricted or prohibited items and materials, required customs forms, and rates for various classes of service.[6] Various countries have specific and often extensive lists of items that may not be sent by mail at all or that must be sent using particular postal service options.

## Memos

Electronic media have replaced most internal printed memos in many companies, but you may have occasion to send printed memos from time to time. These can be simple announcements or messages, or they can be short reports using the memo format.

On your document, include a title such as MEMO or INTEROFFICE CORRESPONDENCE (all in capitals) centered at the top of the page or aligned with the left margin. Also at the top, include the words *To*, *From*, *Date*, and *Subject*—followed by the appropriate information—with a blank line between as shown here:

**MEMO**

TO:

FROM:

DATE:

SUBJECT:

Sometimes the heading is organized like this:

**MEMO**

| | |
|---|---|
| TO: | FROM: |
| DATE: | SUBJECT: |

The following guidelines will help you effectively format specific memo elements:

- **Addressees.** When sending a memo to a long list of people, include the notation *See distribution list* or *See below* in the *To* position at the top; then list the names at the end of the memo. Arrange this list alphabetically, except when high-ranking officials deserve more prominent placement. You can also address memos to groups of people—*All Sales Representatives, Production Group, New Product Team*.
- **Courtesy titles.** You need not use courtesy titles anywhere in a memo; first initials and last names, first names, or even initials alone are often sufficient. However, use a courtesy title if you would use one in a face-to-face encounter with the person.
- **Subject line.** The subject line of a memo helps busy colleagues quickly find out what your memo is about, so take care to make it concise and compelling.
- **Body.** Start the body of the memo on the second or third line below the heading. Like the body of a letter, it's usually single-spaced with blank lines between paragraphs. Indenting paragraphs is optional. Handle lists, important passages, and subheadings as you do in letters.
- **Second page.** If the memo carries over to a second page, head the second page just as you head the second page of a letter.
- **Writer's initials.** Unlike a letter, a memo doesn't require a complimentary close or a signature, because your name is already prominent at the top. However, you may initial the memo—either beside the name appearing at the top of the memo or at the bottom of the memo.
- **Other elements.** Treat elements such as reference initials and copy notations just as you would in a letter. One difference between letters and memos is that while letters use the term *enclosure* to refer to other pieces included with the letter, memos usually use the word *attachment*.

Memos may be delivered by hand, by the post office (when the recipient works at a different location), or through interoffice mail. Interoffice mail may require the use of special reusable envelopes that have spaces for the recipient's name and department or room number; the name of the previous recipient is simply crossed out. If a regular envelope is used, the words *Interoffice Mail* appear where the stamp normally goes, so that it won't accidentally be stamped and mailed with the rest of the office correspondence.

Informal, routine, or brief reports for distribution within a company are often presented in memo form. Don't include report parts such as a table of contents and appendixes, but write the body of the memo report just as carefully as you'd write a formal report.

## Reports

Enhance the effectiveness of your reports by paying careful attention to their appearance and layout. Follow whatever guidelines your organization prefers, always being neat and consistent throughout. If it's up to you to decide formatting questions, the following conventions may help you decide how to handle margins, headings, and page numbers.

### MARGINS

All margins on a report page should be at least 1 inch wide. The top, left, and right margins are usually the same, but the bottom margins can be 1½ times deeper. Some special pages also have deeper top margins. Set top margins as deep as 2 inches for pages that contain major titles: prefatory parts (such as the table of contents or the executive summary), supplementary parts (such as the reference notes or bibliography), and textual parts (such as the first page of the text or the first page of each chapter).

If you're going to bind your report at the left or at the top, add half an inch to the margin on the bound edge (see Figure A.8): The space taken by the binding on left-bound reports makes the center point of the text a quarter inch to the right of the center of the paper. Be sure to center headings between the margins, not between the edges of the paper.

### HEADINGS

If you don't have a template supplied by your employer, choose a design for headings and subheadings that clearly distinguishes the various levels in the hierarchy. The first-level headings should be the most prominent, on down to the lowest-level subheading.

### PAGE NUMBERS

Every page in a report is counted; however, not all pages show numbers. The first page of the report, normally the title page, is unnumbered. All other pages in the prefatory section are numbered with a lowercase roman numeral, beginning with *ii* and continuing with *iii, iv, v*, and so on. Start numbering

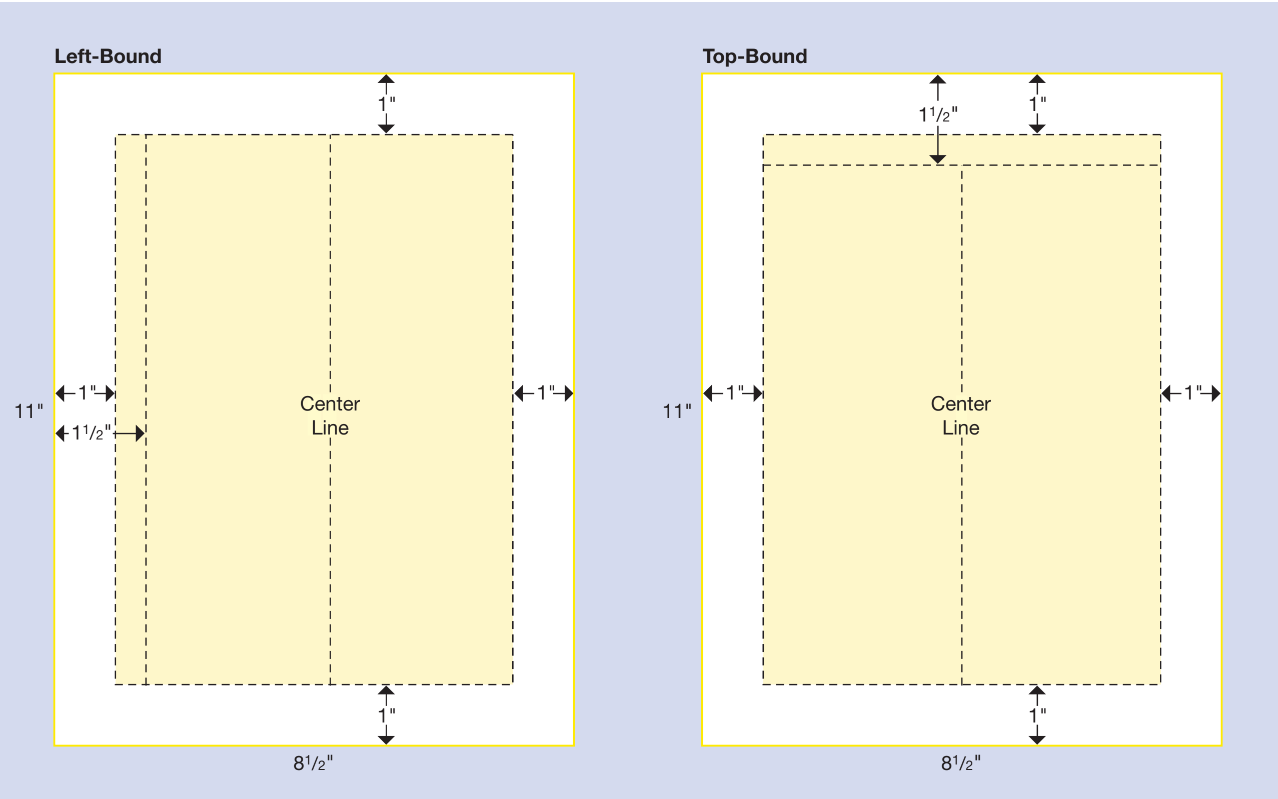



**Figure A.8** **Margins for Formal Reports**

again with arabic numerals (1, 2, and so on) starting at the first page of the body.

You have many options for placing and formatting the page numbers, although these choices are usually made for you in a template. If you're not using a standard company template, position the page number where it is easy to see as the reader flips through the report. If the report will be stapled or otherwise bound along the left side, for instance, the best place for the page number is the upper right or lower right corner.

## Endnotes

**1.** Mary A. De Vries, *Internationally* Yours (Boston: Houghton Mifflin, 1994), 9.
**2.** Patricia A. Dreyfus, "Paper That's Letter Perfect," *Money*, May 1985, 184.
**3.** Linda Driskill, *Business and Managerial Communication: New Perspectives* (Orlando, Fla.: Harcourt Brace Jovanovich, 1992), 470.
**4.** Lennie Copeland and Lewis Griggs, *Going International: How to Make Friends and Deal Effectively in the Global Marketplace*, 2nd ed. (New York: Random House, 1985), 24–27.
**5.** De Vries, *Internationally Yours*, 8.
**6.** U.S. Postal Service, *International Mail Manual*, Issue 34, 14 May 2007, www.usps.gov.

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# B Documentation of Report Sources

By providing information about your sources, you improve your own credibility as well as the credibility of the facts and opinions you present. Documentation gives readers the means for checking your findings and pursuing the subject further. Also, documenting your report is the accepted way to give credit to the people whose work you have drawn from.

What style should you use to document your report? Experts recommend various forms, depending on your field or discipline. Moreover, your employer or client may use a form different from those the experts suggest. Don't let this discrepancy confuse you. If your employer specifies a form, use it; the standardized form is easier for colleagues to understand. However, if the choice of form is left to you, adopt one of the styles described here. Whatever style you choose, be consistent within any given report, using the same order, punctuation, and format from one reference citation or bibliography entry to the next.

A wide variety of style manuals provide detailed information on documentation. These publications explain the three most commonly used styles:

- American Psychological Association, *Publication Manual of the American Psychological Association*, 6th ed. (Washington, D.C.: American Psychological Association, 2009). Details the author-date system, which is preferred in the social sciences and often in the natural sciences as well.
- *The Chicago Manual of Style*, 16th ed. (Chicago: University of Chicago Press, 2010). Often referred to only as "*Chicago*" and widely used in the publishing industry; provides detailed treatment of source documentation and many other aspects of document preparation.
- Joseph Gibaldi, *MLA Style Manual and Guide to Scholarly Publishing*, 3rd ed. (New York: Modern Language Association, 2008). Serves as the basis for the note and bibliography style used in much academic writing and is recommended in many college textbooks on writing term papers; provides a lot of examples in the humanities.

For more information on these three guides, visit **http://real-timeupdates.com/bce7** and click on Appendix B. Although many schemes have been proposed for organizing the information in source notes, all of them break the information into parts: (1) information about the author (name), (2) information about the work (title, edition, volume number), (3) information about the publication (place, publisher), (4) information about the date, and (5) information on relevant page ranges.

The following sections summarize the major conventions for documenting sources in three styles: *The Chicago Manual of Style* (*Chicago*), the *Publication Manual of the American Psychological Association* (APA), and the *MLA Style Manual* (MLA).

## *Chicago* Humanities Style

*The Chicago Manual of Style* recommends two types of documentation systems. The *documentary-note*, or *humanities*, style gives bibliographic citations in notes—either footnotes (when printed at the bottom of a page) or endnotes (when printed at the end of the report). The humanities system is often used in literature, history, and the arts. The other system recommended by *Chicago* is the *author-date* system, which cites the author's last name and the date of publication in the text, usually in parentheses, reserving full documentation for the reference list (or bibliography). For the purpose of comparing styles, this section concentrates on the humanities system, which is described in detail in *Chicago*.

### IN-TEXT CITATION—*CHICAGO* HUMANITIES STYLE

To document report sources in text, the humanities system relies on superscripts—arabic numerals placed just above the line of type at the end of the reference:

> Toward the end of his speech, Myers sounded a note of caution, saying that even though the economy is expected to grow, it could easily slow a bit.[10]

The superscript lets the reader know how to look for source information in either a footnote or an endnote (see Figure B.1 on the next page). Some readers prefer footnotes so that they can simply glance at the bottom of the page for information. Others prefer endnotes so that they can read the text without a clutter of notes on the page. Also, endnotes relieve the writer from worrying about how long each note will be and how much space it will take away from the page. Both footnotes and endnotes are handled automatically by today's word-processing software.

For the reader's convenience, you can use footnotes for *content notes* (which may supplement your main text with asides about a particular issue or event, provide a cross-reference to another section of your report, or direct the reader to a related source). Then you can use endnotes for *source notes* (which document direct quotations, paraphrased passages, and visual aids). Consider which type of note is most common in your report, and then choose whether to present

NOTES

Journal article with volume and issue numbers

1. Jonathan Clifton, "Beyond Taxonomies of Influence," *Journal of Business Communication* 46, no. 1 (2009): 57–79.

Brochure

2. BestTemp Staffing Services, *An Employer's Guide to Staffing Services,* 2d ed. (Denver: BestTemp Information Center, 2014), 31.

Newspaper article, no author

3. "Might Be Harder Than It Looks," *Los Angeles Times,* 30 January 2013, sec. A, p. 22.

Annual report

4. The Walt Disney Company, *2012 Annual Report* (Burbank, Calif.: The Walt Disney Company, 2013), 48.

Magazine article

5. Kerry A. Dolan, "A Whole New Crop" *Forbes*, 2 June 2013, 72–75.

Television broadcast

6. Daniel Han, "Trade Wars Heating Up Around the Globe," *CNN Headline News* (Atlanta: CNN, 5 March 2013).

Internet, World Wide Web

7. "Intel—Company Capsule," Hoover's Online [cited 19 June 2011], 3 screens; available from www.hoovers.com/intel/-ID_13787-/free-co-factsheet.xhtml.

Book, component parts

8. Sonja Kuntz, "Moving Beyond Benefits," in *Our Changing Workforce,* ed. Randolf Jacobson (New York: Citadel Press, 2001), 213–27.

Unpublished dissertation or thesis

9. George H. Morales, "The Economic Pressures on Industrialized Nations in a Global Economy" (Ph.D. diss., University of San Diego, 2001), 32–47.

Paper presented at a meeting

10. Charles Myers, "HMOs in Today's Environment" (paper presented at the Conference on Medical Insurance Solutions, Chicago, Ill., August 2001), 16–17.

Online magazine article

11. Leo Babauta, "17 Tips to Be Productive with Instant Messaging," in *Web Worker Daily* [online] (San Francisco, 2011 [updated 14 November 2012; cited 14 February 2013]); available from http://webworkerdaily.com.

Interview

12. Georgia Stainer, general manager, Day Cable and Communications, interview by author, Topeka, Kan., 2 March 2011.

Newspaper article, one author

13. Evelyn Standish, "Global Market Crushes OPEC's Delicate Balance of Interests," *Wall Street Journal,* 19 January 2002, sec. A, p. 1.

Book, two authors

14. Miriam Toller and Jay Fielding, *Global Business for Smaller Companies* (Rocklin, Calif.: Prima Publishing, 2001), 102–3.

Government publication

15. U.S. Department of Defense, *Stretching Research Dollars: Survival Advice for Universities and Government Labs* (Washington, D.C.: GPO, 2002), 126.

**Figure B.1 Sample Endnotes—*Chicago* Humanities Style**

these notes all as endnotes or all as footnotes. Regardless of the method you choose for referencing textual information in your report, notes for visual aids (both content notes and source notes) are placed on the same page as the visual.

## BIBLIOGRAPHY—*CHICAGO* HUMANITIES STYLE

The humanities system may or may not be accompanied by a bibliography (because the notes give all the necessary bibliographic information). However, endnotes are arranged in order of appearance in the text, so an alphabetical bibliography can be valuable to your readers. The bibliography may be titled *Bibliography, Reference List, Sources, Works Cited* (if you include only those sources you actually cited in your report), or *Works Consulted* (if you include uncited sources as well). This list of sources may also serve as a reading list for those who want to pursue the subject of your report further, so you may want to annotate each entry—that is, comment on the subject matter and viewpoint of the source, as well as on its usefulness to readers. Annotations may be written in either complete or incomplete sentences. A bibliography may also be more manageable if you subdivide it into categories (a classified bibliography), either by type of reference (such as books, articles, and unpublished material) or by subject matter (such as government regulation, market forces, and so on). Following are the major conventions for developing a bibliography according to *Chicago* style (see Figure B.2):

- Exclude any page numbers that may be cited in source notes, except for journals, periodicals, and newspapers.
- Alphabetize entries by the last name of the lead author (listing last name first). The names of second and succeeding authors are listed in normal order. Entries

BIBLIOGRAPHY

| | |
|---|---|
| Online magazine article | Babauta, Leo. “17 Tips to Be Productive with Instant Messaging,” In *Web Worker Daily* [online], San Francisco, 2011 [updated 14 November 2012, cited 14 February 2013]. Available from http://webworkerdaily.com. |
| Brochure | BestTemp Staffing Services. *An Employer’s Guide to Staffing Services.* 2d ed. Denver: BestTemp Information Center, 2014. |
| Journal article with volume and issue numbers | Clifton, Jonathan. “Beyond Taxonomies of Influence.” *Journal of Business Communication* 46, no. 1 (2009): 57–79. |
| Magazine article | Dolan, Kerry A. “A Whole New Crop,” *Forbes*, 2 June 2013, 72–75. |
| Television broadcast | Han, Daniel. “Trade Wars Heating Up Around the Globe.” *CNN Headline News.* Atlanta: CNN, 5 March 2013. |
| Internet, World Wide Web | “Intel—Company Capsule.” *Hoover’s Online* [cited 19 June 2011]. 3 screens; Available from www.hoovers.com/intel/-ID_13787-/free-co-factsheet.xhtml. |
| Book, component parts | Kuntz, Sonja. “Moving Beyond Benefits.” In *Our Changing Workforce*, edited by Randolf Jacobson. New York: Citadel Press, 2001. |
| Newspaper article, no author | “Might Be Harder Than It Looks.” *Los Angeles Times,* 30 January 2013, sec. A, p. 22. |
| Unpublished dissertation or thesis | Morales, George H. “The Economic Pressures on Industrialized Nations in a Global Economy.” Ph.D. diss., University of San Diego, 2001. |
| Paper presented at a meeting | Myers, Charles. “HMOs in Today’s Environment.” Paper presented at the Conference on Medical Insurance Solutions, Chicago, Ill., August 2001. |
| Interview | Stainer, Georgia, general manager, Day Cable and Communications. Interview by author. Topeka, Kan., 2 March 2011. |
| Newspaper article, one author | Standish, Evelyn. “Global Market Crushes OPEC’s Delicate Balance of Interests.” *Wall Street Journal,* 19 January 2002, sec. A, p. 1. |
| Book, two authors | Toller, Miriam, and Jay Fielding. *Global Business for Smaller Companies.* Rocklin, Calif.: Prima Publishing, 2001. |
| Government publication | U.S. Department of Defense. *Stretching Research Dollars: Survival Advice for Universities and Government Labs.* Washington, D.C.: GPO, 2002. |
| Annual report | The Walt Disney Company, *2012 Annual Report,* Burbank, Calif.: The Walt Disney Company, 2013. |

**Figure B.2** **Sample Bibliography—*Chicago* Humanities Style**

without an author name are alphabetized by the first important word in the title.

- Format entries as hanging indents (indent second and succeeding lines three to five spaces).
- Arrange entries in the following general order: (1) author name, (2) title information, (3) publication information, (4) date, (5) periodical page range.
- Use quotation marks around the titles of articles from magazines, newspapers, and journals. Capitalize the first and last words, as well as all other important words (except prepositions, articles, and coordinating conjunctions).
- Use italics to set off the names of books, newspapers, journals, and other complete publications. Capitalize the first and last words, as well as all other important words.
- For journal articles, include the volume number and the issue number (if necessary). Include the year of publication inside parentheses and follow with a colon and the page range of the article: *Journal of Business Communication* 46, no. 1 (2009): 57–79. (In this source, the volume is 46, the number is 1, and the page range is 57–79.)
- Use brackets to identify all electronic references: [Online database] or [CD-ROM].
- Explain how electronic references can be reached: Available from www.spaceless.com/WWWVL.
- Give the citation date for online references: Cited 23 August 2015.

## APA Style

The American Psychological Association (APA) recommends the author-date system of documentation, which is popular in the physical, natural, and social sciences. When using this system, you simply insert the author’s last name and the year of publication within parentheses following the text discussion of the material cited. Include a page number if you use a direct quotation. This approach briefly identifies the source so that readers can locate complete information in the alphabetical reference list at the end of the report. The author-date system is both brief and clear, saving readers time and effort.

### IN-TEXT CITATION—APA STYLE

To document report sources in text using APA style, insert the author's surname and the date of publication at the end of a statement. Enclose this information in parentheses. If the author's name is referred to in the text itself, then the name can be omitted from parenthetical material.

> Some experts recommend both translation and back-translation when dealing with any non-English-speaking culture (Clifton, 2009).
>
> Toller and Fielding (2001) make a strong case for small companies succeeding in global business.

Personal communications and interviews conducted by the author would not be listed in the reference list at all. Such citations would appear in the text only.

> Increasing the role of cable companies is high on the list of Georgia Stainer, general manager at Day Cable and Communications (personal communication, March 2, 2011).

### LIST OF REFERENCES—APA STYLE

For APA style, list only those works actually cited in the text (so you would not include works for background or for further reading). Following are the major conventions for developing a reference list according to APA style (see Figure B.3):

- Format entries as hanging indents.
- List all author names in reversed order (last name first), and use only initials for the first and middle names.
- Arrange entries in the following general order: (1) author name, (2) date, (3) title information, (4) publication information, (5) periodical page range.
- Follow the author name with the date of publication in parentheses.
- List titles of articles from magazines, newspapers, and journals without underlines or quotation marks. Capitalize only the first word of the title, any proper nouns, and the first word to follow an internal colon.
- Italicize titles of books, capitalizing only the first word, any proper nouns, and the first word to follow a colon.
- Italicize titles of magazines, newspapers, journals, and other complete publications. Capitalize all the important words in the title.
- For journal articles, include the volume number (in italics) and, if necessary, the issue number (in parentheses). Finally, include the page range of the article: *Journal of Business Communication, 46*(1), 57–79. (In this example, the volume is 46, the number is 1, and the page range is 57–79.)
- Include personal communications (such as letters, memos, email, and conversations) only in text, not in reference lists.
- Electronic references include author, date of publication, title of article, name of publication (if one), volume, date of retrieval (month, day, year), and the source.
- For electronic references, indicate the actual year of publication.
- For webpages with extremely long URLs, use your best judgment to determine which URL from the site to use. For example, rather than giving the URL of a specific news release with a long URL, you can provide the URL of the "Media relations" webpage.
- APA citation guidelines for social media are still evolving. For the latest information, visit the APA Style Blog.
- For online journals or periodicals that assign a digital object identifier (DOI), include that instead of a conventional URL. If no DOI is available, include the URL of the publication's home page.

## MLA Style

The style recommended by the Modern Language Association of America is used widely in the humanities, especially in the study of language and literature. Like APA style, MLA style uses brief parenthetical citations in the text. However, instead of including author name and year, MLA citations include author name and page reference.

### IN-TEXT CITATION—MLA STYLE

To document report sources in text using MLA style, insert the author's last name and a page reference inside parentheses following the cited material: (Matthews 63). If the author's name is mentioned in the text reference, the name can be omitted from the parenthetical citation: (63). The citation indicates that the reference came from page 63 of a work by Matthews. With the author's name, readers can find complete publication information in the alphabetically arranged list of works cited that comes at the end of the report.

> Some experts recommend both translation and back-translation when dealing with any non-English-speaking culture (Clifton 57).
>
> Toller and Fielding make a strong case for small companies succeeding in global business (102–03).

REFERENCES


Online magazine article — Babauta, L. (2007, November 14). 17 tips to be productive with instant messaging. *Web Worker Daily*. Retrieved from http://webworkerdaily.com

Brochure — BestTemp Staffing Services. (2014). *An employer's guide to staffing services* (2nd ed.) [Brochure]. Denver, CO: BestTemp Information Center.

Journal article with volume and issue numbers — Clifton, J. (2009). Beyond taxonomies of influence. *Journal of Business Communication, 46*(1), 57.

Magazine article — Dolan, K. A. (2013, June 2). A whole new crop. *Forbes*, 72–75.

Television broadcast — Han, D. (2013, March 5). Trade wars heating up around the globe. *CNN Headline News* [Television broadcast]. Atlanta, GA: CNN.

Internet, World Wide Web — Hoover's Online. (2011). *Intel—company capsule*. Retrieved from http://www.hoovers.com/intel/-ID_13787-/free-co-factsheet.xhtml

Book, component parts — Kuntz, S. (2001). Moving beyond benefits. In Randolph Jacobson (Ed.), *Our changing workforce* (pp. 213–227). New York, NY: Citadel Press.

Newspaper article, no author — Might be harder than it looks. (2013, January 30). *Los Angeles Times,* p. A22.

Unpublished dissertation or thesis — Morales, G. H. (2001). *The economic pressures on industrialized nations in a global economy*. Unpublished doctoral dissertation, University of San Diego.

Paper presented at a meeting — Myers, C. (2001, August). *HMOs in today's environment*. Paper presented at the Conference on Medical Insurance Solutions, Chicago, IL.

Interview — *Cited in text only, not in the list of references.*

Newspaper article, one author — Standish, E. (2002, January 19). Global market crushes OPEC's delicate balance of interests. *Wall Street Journal*, p. A1.

Book, two authors — Toller, M., & Fielding, J. (2001). *Global business for smaller companies*. Rocklin, CA: Prima Publishing.

Government publication — U.S. Department of Defense. (2002). *Stretching research dollars: Survival advice for universities and government labs*. Washington, DC: U.S. Government Printing Office.

Annual report — The Walt Disney Company. (2013). *2012 Annual report,* Burbank, CA: The Walt Disney Company.


**Figure B.3 Sample References—APA Style**

## LIST OF WORKS CITED—MLA STYLE

The *MLA Style Manual* recommends preparing the list of works cited first so that you will know what information to give in the parenthetical citation (for example, whether to add a short title if you're citing more than one work by the same author, or whether to give an initial or first name if you're citing two authors who have the same last name). The list of works cited appears at the end of your report, contains all the works that you cite in your text, and lists them in alphabetical order. Following are the major conventions for developing a reference list according to MLA style (see Figure B.4 on the next page):

- Format entries as hanging indents.
- Arrange entries in the following general order: (1) author name, (2) title information, (3) publication information, (4) date, (5) periodical page range.
- List the lead author's name in reverse order (last name first), using either full first names or initials. List second and succeeding author names in normal order.
- Use quotation marks around the titles of articles from magazines, newspapers, and journals. Capitalize all important words.
- Italicize the names of books, newspapers, journals, and other complete publications, capitalizing all main words in the title.
- For journal articles, include the volume number and the issue number (if necessary). Include the year of publication inside parentheses and follow with a colon and the page range of the article: *Journal of Business Communication* 46, 1 (2009): 57. (In this source, the volume is 46, the number is 1, and the page is 57.)
- Electronic sources are less fixed than print sources, and they may not be readily accessible to readers. So citations

WORKS CITED

| | |
|---|---|
| Online magazine article | Babauta, Leo. "17 Tips to Be Productive with Instant Messaging," *Web Worker Daily* 14 Nov. 2012. 14 Feb. 2013. http://webworkerdaily.com |
| Brochure | BestTemp Staffing Services. *An Employer's Guide to Staffing Services*. 2d ed. Denver: BestTemp Information Center, 2014. |
| Journal article with volume and issue numbers | Clifton, Jonathan. "Beyond Taxonomies of Influence." *Journal of Business Communication* 46, 1 (2009): 57–79. |
| Magazine article | Dolan, Kerry A. "A Whole New Crop" *Forbes*, 2 June 2013: 72–75. |
| Television broadcast | Han, Daniel. "Trade Wars Heating Up Around the Globe." *CNN Headline News*. CNN, Atlanta. 5 Mar. 2013. |
| Internet, World Wide Web | "Intel—Company Capsule." *Hoover's Online*. 2011. Hoover's Company Information. 19 June 2011 http://www.hoovers.com/intel/-ID_13787/free-co-factsheet.xhtml |
| Book, component parts | Kuntz, Sonja. "Moving Beyond Benefits." *Our Changing Workforce*. Ed. Randolf Jacobson. New York: Citadel Press, 2001. 213–27. |
| Newspaper article, no author | "Might Be Harder Than It Looks." *Los Angeles Times,* 30 Jan. 2013: A22. |
| Unpublished dissertation or thesis | Morales, George H. "The Economic Pressures on Industrialized Nations in a Global Economy." Diss. U of San Diego, 2001. |
| Paper presented at a meeting | Myers, Charles. "HMOs in Today's Environment." Conference on Medical Insurance Solutions. Chicago. 13 Aug. 2001. |
| Interview | Stainer, Georgia, general manager, Day Cable and Communications. Telephone interview. 2 Mar. 2011. |
| Newspaper article, one author | Standish, Evelyn. "Global Market Crushes OPEC's Delicate Balance of Interests." *Wall Street Journal,* 19 Jan. 2002: A1. |
| Book, two authors | Toller, Miriam, and Jay Fielding. *Global Business for Smaller Companies*. Rocklin, CA: Prima Publishing, 2001. |
| Government publication | United States. Department of Defense. *Stretching Research Dollars: Survival Advice for Universities and Government Labs*. Washington: GPO, 2002. |
| Annual report | The Walt Disney Company, *2012 Annual Report*. Burbank, Calif.: The Walt Disney Company, 2013. |

**Figure B.4 Sample Works Cited—MLA Style**

for electronic sources must provide more information. Always try to be as comprehensive as possible, citing whatever information is available (however, see the note below about extremely long URLs).

- The date for electronic sources should contain both the date assigned in the source (if no date is shown, write "n.d." instead) and the date accessed by the researcher.
- The URL for electronic sources must be as accurate and complete as possible, from access-mode identifier (such as http or ftp) to all relevant directory and file names. If the URL is extremely long, however, use the URL of the website's home page or the URL of the site's search page if you used the site's search function to find the article. The *MLA Style Manual* no longer requires writers to include URLs for materials retrieved online. However, follow whatever guidelines your instructor gives you in this regard.
- MLA style requires you to indicate the medium of publication. For most sources, this will be "Web" or "Print," but you may also cite "CD-ROM" and other media, as appropriate.

# C Correction Symbols

Instructors often use these short, easy-to-remember correction symbols and abbreviations when evaluating students' writing. You can use them too, to understand your instructor's suggestions and to revise and proofread your own letters, memos, and reports. Refer to the Handbook of Grammar, Mechanics, and Usage (pages 423–454) for further information.

## Content and Style

| | |
|---|---|
| Acc | Accuracy. Check to be sure information is correct. |
| ACE | Avoid copying examples. |
| ACP | Avoid copying problems. |
| Adp | Adapt. Tailor message to reader. |
| App | Follow proper organization approach. (Refer to Chapter 4.) |
| Assign | Assignment. Review instructions for assignment. |
| AV | Active verb. Substitute active for passive. |
| Awk | Awkward phrasing. Rewrite. |
| BC | Be consistent. |
| BMS | Be more sincere. |
| Chop | Choppy sentences. Use longer sentences and more transitional phrases. |
| Con | Condense. Use fewer words. |
| CT | Conversational tone. Avoid using overly formal language. |
| Depers | Depersonalize. Avoid attributing credit or blame to any individual or group. |
| Dev | Develop. Provide greater detail. |
| Dir | Direct. Use direct approach; get to the point. |
| Emph | Emphasize. Develop this point more fully. |
| EW | Explanation weak. Check logic; provide more proof. |
| Fl | Flattery. Avoid compliments that are insincere. |
| FS | Figure of speech. Find a more accurate expression. |
| GNF | Good news first. Use direct order. |
| GRF | Give reasons first. Use indirect order. |
| GW | Goodwill. Put more emphasis on expressions of goodwill. |
| H/E | Honesty/ethics. Revise statement to reflect good business practices. |
| Imp | Imply. Avoid being direct. |
| Inc | Incomplete. Develop further. |
| Jar | Jargon. Use less specialized language. |
| Log | Logic. Check development of argument. |
| Neg | Negative. Use more positive approach or expression. |
| Obv | Obvious. Do not state point in such detail. |
| OC | Overconfident. Adopt humbler language. |
| OM | Omission. |
| Org | Organization. Strengthen outline. |
| OS | Off the subject. Close with point on main subject. |
| Par | Parallel. Use same structure. |
| Pom | Pompous. Rephrase in down-to-earth terms. |
| PV | Point of view. Make statement from reader's perspective rather than your own. |
| RB | Reader benefit. Explain what reader stands to gain. |
| Red | Redundant. Reduce number of times this point is made. |
| Ref | Reference. Cite source of information. |
| Rep | Repetitive. Provide different expression. |
| RS | Resale. Reassure reader that he or she has made a good choice. |
| SA | Service attitude. Put more emphasis on helping reader. |
| Sin | Sincerity. Avoid sounding glib or uncaring. |
| SL | Stereotyped language. Focus on individual's characteristics instead of on false generalizations. |
| Spec | Specific. Provide more specific statement. |
| SPM | Sales promotion material. Tell reader about related goods or services. |
| Stet | Let stand in original form. |
| Sub | Subordinate. Make this point less important. |
| SX | Sexist. Avoid language that contributes to gender stereotypes. |
| Tone | Tone needs improvement. |

| | |
|---|---|
| Trans | Transition. Show connection between points. |
| UAE | Use action ending. Close by stating what reader should do next. |
| UAS | Use appropriate salutation. |
| UAV | Use active voice. |
| Unc | Unclear. Rewrite to clarify meaning. |
| UPV | Use passive voice. |
| USS | Use shorter sentences. |
| V | Variety. Use different expression or sentence pattern. |
| W | Wordy. Eliminate unnecessary words. |
| WC | Word choice. Find a more appropriate word. |
| YA | "You" attitude. Rewrite to emphasize reader's needs. |

## Grammar, Mechanics, and Usage

| | |
|---|---|
| Ab | Abbreviation. Avoid abbreviations in most cases; use correct abbreviation. |
| Adj | Adjective. Use adjective instead. |
| Adv | Adverb. Use adverb instead. |
| Agr | Agreement. Make subject and verb or noun and pronoun agree. |
| Ap | Appearance. Improve appearance. |
| Apos | Apostrophe. Check use of apostrophe. |
| Art | Article. Use correct article. |
| BC | Be consistent. |
| Cap | Capitalize. |
| Case | Use cases correctly. |
| CoAdj | Coordinate adjective. Insert comma between coordinate adjectives; delete comma between adjective and compound noun. |
| CS | Comma splice. Use period or semicolon to separate clauses. |
| DM | Dangling modifier. Rewrite so that modifier clearly relates to subject of sentence. |
| Exp | Expletive. Avoid expletive beginnings, such as it is, there are, there is, this is, and these are. |
| F | Format. Improve layout of document. |
| Frag | Fragment. Rewrite as complete sentence. |
| Gram | Grammar. Correct grammatical error. |
| HCA | Hyphenate compound adjective. |
| lc | Lowercase. Do not use capital letter. |
| M | Margins. Improve frame around document. |
| MM | Misplaced modifier. Place modifier close to word it modifies. |
| NRC | Nonrestrictive clause (or phrase). Separate from rest of sentence with commas. |
| P | Punctuation. Use correct punctuation. |
| Par | Parallel. Use same structure. |
| PH | Place higher. Move document up on page. |
| PL | Place lower. Move document down on page. |
| Prep | Preposition. Use correct preposition. |
| RC | Restrictive clause (or phrase). Remove commas that separate clause from rest of sentence. |
| RO | Run-on sentence. Separate two sentences with comma and coordinating conjunction or with semicolon. |
| SC | Series comma. Add comma before *and*. |
| SI | Split infinitive. Do not separate *to* from rest of verb. |
| Sp | Spelling error. Consult dictionary. |
| S-V | Subject-verb pair. Do not separate with comma. |
| Syl | Syllabification. Divide word between syllables. |
| WD | Word division. Check dictionary for proper end-of-line hyphenation. |
| WW | Wrong word. Replace with another word. |

# Proofreading Marks

| Symbol | Meaning | Symbol Used in Context | Corrected Copy |
|---|---|---|---|
| | Align horizontally | meaningful result | meaningful result |
| | Align vertically | 1. Power cable<br>2. Keyboard | 1. Power cable<br>2. Keyboard |
| bf | Boldface | Recommendations bf | **Recommendations** |
| | Capitalize | Pepsico, Inc. | PepsiCo, Inc. |
| | Center | Awards Banquet | Awards Banquet |
| | Close up space | self- confidence | self-confidence |
| | Delete | har~~r~~assment ~~and abuse~~ | harassment |
| ds | Double-space | text in first line<br>text in second line ds | text in first line<br><br>text in second line |
| | Insert | u and white<br>t~~i~~rquoise shirts | turquoise and white shirts |
| | Insert apostrophe | our teams goals | our team's goals |
| | Insert comma | a, b and c | a, b, and c |
| | Insert hyphen | third quarter sales | third-quarter sales |
| | Insert period | Harrigan et al | Harrigan et al. |
| | Insert quotation marks | This team isn't cooperating. | This "team" isn't cooperating. |
| # | Insert space | # #<br>realestate testcase | real estate test case |
| ital | Italics | Quarterly Report ital | *Quarterly Report* |
| | Lowercase | TULSA, South of here | Tulsa, south of here |
| | Move down | Sincerely, | Sincerely, |
| | Move left | Attention: Security | Attention: Security |
| | Move right | February 2, 2015 | February 2, 2015 |
| | Move up | THIRD-QUARTER SALES | THIRD-QUARTER SALES |
| STET | Restore | staff talked ~~openly and frankly~~ STET | staff talked openly |
| | Run lines together | Manager,<br>Distribution | Manager, Distribution |
| ss | Single space | text in first line<br><br>text in second line ss | text in first line<br>text in second line |
| | Spell out | COD | cash on delivery |
| sp | Spell out | sp Assn. of Biochem. Engrs. | Association of Biochemical Engineers |
| | Start new line | Marla Fenton, Manager, Distri-<br>bution | Marla Fenton,<br>Manager, Distribution |
| | Start new paragraph | The solution is easy to determine but difficult to implement in a competitive environment like the one we now face. | The solution is easy to determine but difficult to implement in a competitive environment like the one we now face. |
| | Transpose | airy, light, casaul tone | light, airy, casual tone |

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# Handbook of Grammar, Mechanics, and Usage

The rules of grammar, mechanics, and usage provide the guidance every professional needs in order to communicate successfully with colleagues, customers, and other audiences. Understanding and following these rules helps you in two important ways. First, the rules determine how meaning is encoded and decoded in the communication process. If you don't encode your messages using the same rules your readers or listeners use to decode them, chances are your audiences will not extract your intended meaning from your messages. Without a firm grasp of the basics of grammar, mechanics, and usage, you risk being misunderstood, damaging your company's image, losing money for your company, and possibly even losing your job. In other words, if you want to get your point across, you need to follow the rules of grammar, mechanics, and usage. Second, apart from transferring meaning successfully, following the rules tells your audience that you respect the conventions and expectations of the business community.

You can think of *grammar* as the agreed-upon structure of a language, the way that individual words are formed and the manner in which those words are then combined to form meaningful sentences. *Mechanics* are style and formatting issues such as capitalization, spelling, and the use of numbers and symbols. *Usage* involves the accepted and expected way in which specific words are used by a particular community of people—in this case, the community of businesspeople who use English. This handbook can help you improve your knowledge and awareness in all three areas. It is divided into the following sections:

- **Diagnostic Test of English Skills.** Testing your current knowledge of grammar, mechanics, and usage helps you find out where your strengths and weaknesses lie. This test offers 50 items taken from the topics included in this handbook.
- **Assessment of English Skills.** After completing the diagnostic test, use the assessment form to highlight the areas you most need to review.
- **Essentials of Grammar, Mechanics, and Usage with Practice Sessions.** This section helps you quickly review the basics. You can study the things you've probably already learned but may have forgotten about grammar, punctuation, mechanics (including capitalization, abbreviation, number style, and word division), and vocabulary (including frequently confused words, frequently misused words, frequently misspelled words, and transitional words and phrases). Practice sessions throughout this section help you test yourself and reinforce what you learn. Use this essential review not only to study and improve your English skills but also as a reference for any questions you may have during this course.

## Diagnostic Test of English Skills

Use this test to determine whether you need more practice with grammar, punctuation, mechanics, or vocabulary. When you've answered all the questions, ask your instructor for an answer sheet so that you can score the test. On the Assessment of English Skills form (page 425), record the number of questions you answered incorrectly in each section.

The following choices apply to items 1–5. Write in each blank the letter of the choice that best describes the part of speech that is underlined.

**A.** noun
**B.** pronoun
**C.** verb
**D.** adjective
**E.** adverb
**F.** preposition
**G.** conjunction
**H.** article

____ **1.** The new branch location will be decided <u>by</u> next week.
____ **2.** We must hire only <u>qualified</u>, ambitious graduates.
____ **3.** After their <u>presentation</u>, I was still undecided.
____ **4.** See <u>me</u> after the meeting.
____ **5.** Margaret, pressed for time, turned in <u>unusually</u> sloppy work.

In the blanks for items 6–15, write the letter of the word or phrase that best completes each sentence.

____ **6.** (A. Russ's, B. Russ') laptop was stolen last week.
____ **7.** Speaking only for (A. me, B. myself), I think the new policy is discriminatory.
____ **8.** Of the five candidates we interviewed yesterday, (A. who, B. whom) do you believe is the best choice?
____ **9.** India has increased (A. it's, B. its) imports of corn and rice.
____ **10.** Anyone who wants to be (A. their, B. his or her) own boss should think about owning a franchise.
____ **11.** If the IT department can't (A. lie, B. lay) the fiber-optic cable by March 1, the plant will not open on schedule.
____ **12.** Starbucks (A. is, B. are) opening five new stores in San Diego in the next year.
____ **13.** The number of women-owned small businesses (A. has, B. have) increased sharply in the past two decades.

_____ **14.** Greg and Bernyce worked (A. good, B. well) together.

_____ **15.** They distributed the supplies (A. among, B. between) the six staff members.

The following choices apply to items 16–20. Write in each blank the letter of the choice that best describes the sentence structure problem with each item.

**A.** sentence fragment
**B.** comma splice
**C.** misplaced modifier
**D.** fused sentence
**E.** lack of parallelism
**F.** unclear antecedent

_____ **16.** The number of employees who took the buyout offer was much higher than expected, now the entire company is understaffed.

_____ **17.** The leader in Internet-only banking.

_____ **18.** Diamond doesn't actually sell financial products rather it acts as an intermediary.

_____ **19.** Helen's proposal is for not only the present but also for the future.

_____ **20.** When purchasing luxury products, quality is more important than price for consumers.

For items 21–30, circle the letter of the preferred choice in each of the following groups of sentences.

**21. A.** What do you think of the ad slogan "Have it your way?"
**B.** What do you think of the ad slogan "Have it your way"?

**22. A.** Send copies to Jackie Cross, Uniline, Brad Nardi, Peale & Associates, and Tom Griesbaum, MatchMakers.
**B.** Send copies to Jackie Cross, Uniline; Brad Nardi, Peale & Associates; and Tom Griesbaum, MatchMakers.

**23. A.** They've recorded 22 complaints since yesterday, all of them from long-time employees.
**B.** They've recorded 22 complaints since yesterday; all of them from long-time employees.

**24. A.** We are looking for two qualities in applicants: experience with computers and an interest in people.
**B.** We are looking for two qualities in applicants; experience with computers and an interest in people.

**25. A.** At the Center for the Blind the clients we serve have lost vision, due to a wide variety of causes.
**B.** At the Center for the Blind, the clients we serve have lost vision due to a wide variety of causes.

**26. A.** Replace your standard light bulbs with new, compact fluorescent bulbs.
**B.** Replace your standard light bulbs with new, compact, fluorescent bulbs.
**C.** Replace your standard light bulbs with new compact fluorescent bulbs.

**27. A.** Blue Cross of California may have changed its name to Anthem Blue Cross but the company still has the same commitment to California.
**B.** Blue Cross of California may have changed its name to Anthem Blue Cross, but the company still has the same commitment to California.

**28. A.** Only eight banks in this country—maybe nine can handle transactions of this magnitude.
**B.** Only eight banks in this country—maybe nine—can handle transactions of this magnitude.

**29. A.** Instead of focusing on high-growth companies, we targeted mature businesses with only one or two people handling the decision making.
**B.** Instead of focusing on high growth companies, we targeted mature businesses with only one or two people handling the decision-making.

**30. A.** According to board president Damian Cabaza "having a crisis communication plan is a high priority."
**B.** According to board president Damian Cabaza, "Having a crisis communication plan is a high priority."

For items 31–40, select the best choice from among those provided.

**31. A.** At her previous employer, Mary-Anne worked in Marketing Communications and Human Resources.
**B.** At her previous employer, Mary-Anne worked in marketing communications and human resources.

**32. A.** By fall, we'll have a dozen locations between the Mississippi and Missouri rivers.
**B.** By Fall, we'll have a dozen locations between the Mississippi and Missouri Rivers.

**33. A.** The Board applauded President Donlan upon her reelection for a fifth term.
**B.** The board applauded president Donlan upon her reelection for a fifth term.
**C.** The board applauded President Donlan upon her reelection for a fifth term.

**34. A.** If you want to travel to France, you need to be au courant with the business practices.
**B.** If you want to travel to France, you need to be "au courant" with the business practices.

**35. A.** As the company's CEO, Thomas Spurgeon handles all dealings with the FDA.
**B.** As the company's C.E.O., Thomas Spurgeon handles all dealings with the F.D.A.

**36. A.** The maximum speed limit in most states is 65 mph.
**B.** The maximum speed limit in most states is 65 m.p.h.

**37. A.** Sales of graphic novels increased nine percent between 2008 and 2009.
**B.** Sales of graphic novels increased 9 percent between 2008 and 2009.

**38. A.** Our store is open daily from nine a.m. to seven p.m.
**B.** Our store is open daily from 9:00 a.m. to 7:00 p.m.

**39. A.** The organizing meeting is scheduled for July 27, and the event will be held in January 2016.
**B.** The organizing meeting is scheduled for July 27th, and the event will be held in January, 2016.

**40. A.** We need six desks, eight file cabinets, and 12 trashcans.
**B.** We need 6 desks, 8 file cabinets, and 12 trashcans.

For items 41–50, write in each blank the letter of the word that best completes each sentence.

____ **41.** Will having a degree (A. affect, B. effect) my chances for promotion?
____ **42.** Try not to (A. loose, B. lose) this key; we will charge you a fee to replace it.
____ **43.** I don't want to discuss my (A. personal, B. personnel) problems in front of anyone.
____ **44.** Let us help you choose the right tie to (A. complement, B. compliment) your look.
____ **45.** The repairman's whistling (A. aggravated, B. irritated) all of us in accounting.
____ **46.** The bank agreed to (A. loan, B. lend) the Smiths $20,000 for their start-up.
____ **47.** The credit card company is (A. liable, B. likely) to increase your interest rate if you miss a payment.
____ **48.** The airline tries to (A. accommodate, B. accomodate) disabled passengers.
____ **49.** Every company needs a policy regarding sexual (A. harrassment, B. harassment).
____ **50.** Use your best (A. judgment, B. judgement) in selecting a service provider.

# Assessment of English Skills

In the space provided, record the number of questions you answered incorrectly.

| Questions | Skills Area | Number of Incorrect Answers |
|---|---|---|
| 1–5 | Parts of speech | ________ |
| 6–15 | Usage | ________ |
| 16–20 | Sentence structure | ________ |
| 21–30 | Punctuation | ________ |
| 31–40 | Mechanics | ________ |
| 41–50 | Vocabulary | ________ |

If you had more than two incorrect answers in any of the skills areas, focus on those areas in the appropriate sections of this handbook.

# Essentials of Grammar, Mechanics, and Usage

The following sentence looks innocent, but is it really?

> We sell tuxedos as well as rent.

You sell tuxedos, but it's highly unlikely that you sell rent—which is what this sentence says. Whatever you're selling, some people will ignore your message because of a blunder like this. The following sentence has a similar problem:

> Vice President Eldon Neale told his chief engineer that he would no longer be with Avix, Inc., as of June 30.

Is Eldon or the engineer leaving? No matter which side the facts are on, the sentence can be read the other way. Now look at this sentence:

> The year before we budgeted more for advertising sales were up.

> Confused? Perhaps this is what the writer meant:

> The year before, we budgeted more for advertising. Sales were up.

> Or maybe the writer meant this:

> The year before we budgeted more for advertising, sales were up.

These examples show that even short, simple sentences can be misunderstood because of errors on the part of the writer. As you've learned in numerous courses over your schooling, an English sentence consists of the parts of speech being combined with punctuation, mechanics, and vocabulary to convey meaning. Making a point of brushing up on your grammar, punctuation, mechanics, and vocabulary skills will help ensure that you create clear, effective business messages.

# 1.0 Grammar

**Grammar** is the study of how words come together to form sentences. Categorized by meaning, form, and function, English words fall into various parts of speech: nouns, pronouns, verbs, adjectives, adverbs, prepositions, conjunctions, articles, and interjections. You will communicate more clearly if you understand how each of these parts of speech operates in a sentence.

## 1.1 NOUNS

A **noun** names a person, a place, a thing, or an idea. Anything you can see or detect with one of your senses has a noun to name it. Some things you can't see or sense are also nouns—ions, for example, or space. So are things that exist as ideas, such as accuracy and height. (You can see that something is accurate or that a building is tall, but you can't see the idea of accuracy or the idea of height.) These names for ideas are known as **abstract nouns**. The simplest nouns are the names of things you can see or touch: *car*, *building*, *cloud*, *brick*; these are termed **concrete nouns**. A few nouns, such as *algorithm*, *software*, and *code*, are difficult to categorize as either abstract or concrete but can reasonably be considered concrete even though they don't have a physical presence.

### 1.1.1 Proper Nouns and Common Nouns

So far, all the examples of nouns have been **common nouns**, referring to general classes of things. The word *building* refers to a whole class of structures. Common nouns such as *building* are not capitalized.

If you want to talk about one particular building, however, you might refer to the Glazier Building. The name is capitalized, indicating that *Glazier Building* is a **proper noun**.

Here are three sets of common and proper nouns for comparison:

| **Common** | **Proper** |
|---|---|
| city | Kansas City |
| company | Blaisden Company |
| store | Books Galore |

### 1.1.2 Nouns as Subject and Object

Nouns may be used in sentences as subjects or objects. That is, the person, place, thing, or idea that is being or doing (subject) is represented by a noun. So is the person, place, idea, or thing that is being acted on (object). In the following sentence, the nouns are underlined:

The <u>web designer</u> created the <u>homepage</u>.

The web designer (subject) is acting in a way that affects the home page (object). The following sentence is more complicated:

The <u>installer</u> delivered the <u>carpet</u> to the <u>customer</u>.

*Installer* is the subject. *Carpet* is the object of the main part of the sentence (acted on by the installer), and *customer* is the object of the phrase *to the customer*. Nevertheless, both *carpet* and *customer* are objects.

### 1.1.3 Plural Nouns

Nouns can be either singular or plural. The usual way to make a plural noun is to add *s* or *es* to the singular form of the word:

| **Singular** | **Plural** |
|---|---|
| file | files |
| tax | taxes |
| cargo | cargoes |

Many nouns have other ways of forming the plural. Some plurals involve a change in a vowel (*mouse/mice*, *goose/geese*, *woman/women*), the addition of *en* or *ren* (*ox/oxen*, *child/children*), the change from *y* to *ies* (*city/cities, specialty/specialties*), or the change from *f* to *v* (*knife/knives, half/halves;* some exceptions: *fifes*, *roofs*). Some words of Latin origin offer a choice of plurals (*phenomena/phenomenons*, *indexes/indices*, *appendixes/appendices*). It's always a good idea to consult a dictionary if you are unsure of the correct or preferred plural spelling of a word.

The plurals of compound nouns are usually formed by adding *s* or *es* to the main word of the compound (*fathers-in-law, editors-in-chief, attorneys-at-law*).

Some nouns are the same whether singular or plural (*sleep*, *deer*, *moose*). Some nouns are plural in form but singular in use (*ethics, measles*). Some nouns are used in the plural only (*scissors, trousers*).

Letters, numbers, and words used as words are sometimes made plural by adding an apostrophe and an *s* (*A's*, *Ph.D.'s*, *I's*). However, if no confusion would be created by leaving off the apostrophe, it is common practice to just add the *s* (*1990s*, *RFPs*, *DVDs*).

### 1.1.4 Possessive Nouns

A noun becomes possessive when it's used to show the ownership of something. Then you add *'s* to the word:

| | |
|---|---|
| the man's car | the woman's apartment |

However, ownership does not need to be legal:

| | |
|---|---|
| the secretary's desk | the company's assets |

Also, ownership may be nothing more than an automatic association:

| | |
|---|---|
| a day's work | the job's prestige |

An exception to the rule about adding *'s* to make a noun possessive occurs when the word is singular and already has two "s" sounds at the end. In cases like the following, an apostrophe is all that's needed:

| | |
|---|---|
| crisis' dimensions | Mr. Moses' application |

When the noun has only one "s" sound at the end, however, retain the *'s:*

| | |
|---|---|
| Chris's book | Carolyn Nuss's office |

With compound (hyphenated) nouns, add *'s* to the last word:

| **Compound Noun** | **Possessive Noun** |
|---|---|
| mother-in-law | mother-in-law's |
| mayor-elect | mayor-elect's |

To form the possessive of plural nouns, just begin by following the same rule as with singular nouns: add *'s*. However, if the plural noun already ends in an *s* (as most do), drop the one you've added, leaving only the apostrophe:

| | |
|---|---|
| the clients' complaints | employees' benefits |

To denote joint possession by two or more proper nouns, add the *'s* to the last name only (*Moody*, *Nation*, and *Smith's* ad agency). To denote individual possession by two or more persons, add an *'s* to each proper noun (*Moody's*, *Nation's*, and *Smith's* ad agencies).

### 1.1.5 Collective Nouns

Collective nouns encompass a group of people or objects: *crowd*, *jury*, *committee*, *team*, *audience*, *family*, *couple*, *herd*, *class*. They are often treated as singular nouns. (For more on collective nouns, see Section 1.3.4, Subject–Verb Agreement.)

### Practice Session: Nouns

Underline the preferred choice within each set of parentheses in the following sentences.

1. We are moving company headquarters to New York (*City, city*).
2. The historic Bradbury (*Building, building*) is the site of the press conference; the (*Building, building*) is located in downtown Los Angeles.
3. During the conference, our staff will be staying at the Hyatt, Hilton, and Marriott (*hotels', hotels*).
4. Accuracy requires that you cross your (*ts, t's*) and dot your (*is, i's*).
5. The industry has been on a downward spiral since the early (*1990's, 1990s*).
6. The new (*shelfs, shelves*) will be installed on Friday.
7. Our (*specialtys, specialties*) are unparalleled service and premium brands.
8. As a result of several Internet-related (*cases, case's*), the copyright laws are under scrutiny.
9. Before a job interview, you should learn about the (*company's, companies'*) mission statement.
10. Sending the newsletter to the printer is the (*editor's-in-chief, editor-in-chief's*) responsibility.
11. All the downtown (*business', businesses', businesses's*) signs must be repainted.
12. Because the (*passenger's, passengers'*) luggage had been damaged, they had to file claims with the airline.
13. Dealing with angry customers is all in a (*days, day's, days'*) work for Mr. Jemas.
14. Its large airport is one of (*Dallases, Dallas', Dallas's*) main appeals for industrial firms.
15. We were skeptical of (*Jone's, Jones', Jones's*) plan.

## 1.2 PRONOUNS

A **pronoun** is a word that stands for a noun; it saves repeating the noun:

> Employees have some choice of weeks for vacation, but *they* must notify the HR office of *their* preference by March 1.

The pronouns *they* and *their* stand in for the noun *employees*. The noun that a pronoun stands for is called the **antecedent** of the pronoun; *employees* is the antecedent of *they* and *their*.

When the antecedent is plural, the pronoun that stands in for it has to be plural; *they* and *their* are plural pronouns because *employees* is plural. Likewise, when the antecedent is singular, the pronoun has to be singular:

> We thought the contract had expired, but we soon learned that *it* had not.

### 1.2.1 Multiple Antecedents

Sometimes a pronoun has a double (or even a triple) antecedent:

> Kathryn Boettcher and Luis Gutierrez went beyond *their* sales quotas for January.

If taken alone, *Kathryn Boettcher* is a singular antecedent. So is *Luis Gutierrez*. However, when together they are the plural antecedent of a pronoun, so the pronoun has to be plural. Thus the pronoun is *their* instead of *her* or *his*.

### 1.2.2 Unclear Antecedents

In some sentences the pronoun's antecedent is unclear:

> Sandy Wright sent Jane Brougham *her* production figures for the previous year. *She* thought they were too low.

To which person does the pronoun *her* refer? Someone who knew Sandy and Jane and knew their business relationship might be able to figure out the antecedent for *her*. Even with such an advantage, however, a reader might receive the wrong meaning. Also, it would be nearly impossible for any reader to know which name is the antecedent of *she*.

The best way to clarify an ambiguous pronoun is usually to rewrite the sentence, repeating nouns when needed for clarity:

> Sandy Wright sent her production figures for the previous year to Jane Brougham. Jane thought they were too low.

The noun needs to be repeated only when the antecedent is unclear.

### 1.2.3 Pronoun Classes

**Personal pronouns** consist of *I, you, we/us, he/him, she/her, it*, and *they/them*.

**Compound personal pronouns** are created by adding *self* or *selves* to simple personal pronouns: *myself, ourselves, yourself, yourselves, himself, herself, itself, themselves*. Compound personal pronouns are used either *intensively*, to emphasize the identity of the noun or pronoun (I *myself* have seen the demonstration), or *reflexively*, to indicate that the subject is the receiver of his or her own action (I promised *myself* I'd finish by noon). Compound personal pronouns are used incorrectly if they appear in a sentence without their antecedent:

> Walter, Virginia, and *I* (not *myself*) are the top salespeople.
>
> You need to tell *her* (not *herself*) about the mixup.

**Relative pronouns** refer to nouns (or groups of words used as nouns) in the main clause and are used to introduce clauses:

> Purina is the brand *that* most dog owners purchase.

The relative pronouns are *which, who, whom, whose,* and *what*. Other words used as relative pronouns include *that, whoever, whomever, whatever*, and *whichever*.

**Interrogative pronouns** are those used for asking questions: *who, whom, whose, which,* and *what*.

**Demonstrative pronouns** point out particular persons, places, or things:

*That* is my desk. *This* can't be correct.

The demonstrative pronouns are *this, these, that,* and *those*.

**Indefinite pronouns** refer to persons or things not specifically identified. They include *anyone, someone, everyone, everybody, somebody, either, neither, one, none, all, both, each, another, any, many*, and similar words.

### 1.2.4 Case of Pronouns

The case of a pronoun tells whether it's acting or acted upon:

*She* sells an average of five packages each week.

In this sentence, *she* is doing the selling. Because *she* is acting, *she* is said to be in the **nominative case**. Now consider what happens when the pronoun is acted upon:

After six months, Ms. Browning promoted *her*.

In this sentence, the pronoun *her* is acted upon and is thus said to be in the **objective case**.

Contrast the nominative and objective pronouns in this list:

| Nominative | Objective |
|---|---|
| I | me |
| we | us |
| he | him |
| she | her |
| they | them |
| who | whom |
| whoever | whomever |

Objective pronouns may be used as either the object of a verb (such as *promoted*) or the object of a preposition (such as *with*):

Rob worked with *them* until the order was filled.

In this example, *them* is the object of the preposition *with* because Rob acted upon—worked with—them. Here's a sentence with three pronouns, the first one nominative, the second the object of a verb, and the third the object of a preposition:

*He* paid *us* as soon as the check came from *them*.

*He* is nominative; *us* is objective because it's the object of the verb *paid; them* is objective because it's the object of the preposition *from*.

Every writer sometimes wonders whether to use *who* or *whom:*

(*Who*, *Whom*) will you hire?

Because this sentence is a question, it's difficult to see that *whom* is the object of the verb *hire*. You can figure out which pronoun to use if you rearrange the question and temporarily try *she* and *her* in place of *who* and *whom:* "Will you hire *she?*" or "Will you hire *her?*" *Her* and *whom* are both objective, so the correct choice is "Whom will you hire?" Here's a different example:

(*Who*, *Whom*) logged so much travel time?

Turning the question into a statement, you get:

He logged so much travel time.

Therefore, the correct statement is:

Who logged so much travel time?

### 1.2.5 Possessive Pronouns

Possessive pronouns work like possessive nouns—they show ownership or automatic association:

| | |
|---|---|
| her job | their preferences |
| his account | its equipment |

However, possessive pronouns are different from possessive nouns in the way they are written. Possessive pronouns never have an apostrophe:

| Possessive Noun | Possessive Pronoun |
|---|---|
| the woman's estate | her estate |
| Roger Franklin's plans | his plans |
| the shareholders' feelings | their feelings |
| the vacuum cleaner's attachments | its attachments |

The word *its* is the possessive of *it*. Like all other possessive pronouns, *its* has no apostrophe. Some people confuse *its* with *it's*, the contraction of *it is*. (Contractions are discussed in Section 2.9, Apostrophes.)

### 1.2.6 Pronoun-Antecedent Agreement

Like nouns, pronouns can be singular or plural. Pronouns must agree in number with their antecedents—a singular antecedent requires a singular pronoun:

The president of the board tendered *his* resignation.

Multiple antecedents require a plural pronoun:

The members of the board tendered *their* resignations.

A pronoun referring to singular antecedents connected by *or* or *nor* should be singular:

Neither Sean nor Terry made his quota.

But a pronoun referring to a plural and a singular antecedent connected by *or* or *nor* should be plural:

Neither Sean nor the twins made *their* quotas.

Formal English prefers the nominative case after the linking verb *to be:*

It is *I*. That is *he*.

However, for general usage it's perfectly acceptable to use the more natural "It's me" and "That's him."

### Practice Session: Pronouns

Underline the preferred choice within each set of parentheses in the following sentences.

1. Just between you and (*I, me*), I don't think we will make the deadline.
2. The final speaker at the luncheon was (*she, her*).
3. When you are finished, give the report to (*he, him*).
4. (*We, Us*) telemarketers have a tarnished reputation.
5. The company is sending the marketing communications staff—Mary-Ann, Alan, and (*I, me, myself*)—to the conference.
6. The company will issue (*their, its*) annual report next month.
7. Anyone who hasn't yet turned in (*their, his or her*) questionnaire should do so by tomorrow.
8. (*Who, Whom*) shall I say called?
9. To (*who, whom*) should I address the letter?
10. (*Who, Whom*) will they hire?
11. We need more people in our department like (*she, her*).
12. When dealing with an angry customer, try to calm (*him, him or her, them*) down.
13. It was either Sarah or Charlene who left (*her, their*) briefcase on the train.
14. The company needs to update (*its, it's*) website.
15. (*Who, Whom*) do you think will be given the promotion?
16. Be sure to include (*your, you're*) e-mail address on the form.
17. Each brand should have (*its, their*) own trademark.
18. The "dynamic duo"—Bruce and (*I, me*)—are in charge of next week's office party.
19. The supervisor thanked the team members for (*their, they're*) support.
20. The pharmaceutical giant agreed to take (*their, its*) diet drug off the market.

## 1.3 VERBS

A **verb** describes an action or acts as a link between a subject and words that define or describe that subject:

They all *quit* in disgust.

Working conditions *were* substandard.

The English language is full of **action verbs**. Here are a few you'll often run across in the business world:

| | | |
|---|---|---|
| verify | perform | fulfill |
| hire | succeed | send |
| leave | improve | receive |
| accept | develop | pay |

You could undoubtedly list many more.

The most common linking verbs are all the forms of *to be*: I *am, was*, or *will be;* you *are, were*, or *will be*. Other words that can serve as linking verbs include *seem*, *become*, *appear*, *prove*, *look*, *remain*, *feel*, *taste*, *smell*, *sound*, *resemble*, *turn*, and *grow*:

It *seemed* a good plan at the time.

She *sounds* impressive at a meeting.

The time *grows* near for us to make a decision.

These verbs link what comes before them in the sentence with what comes after; no action is involved. (See Section 1.7.5 for a fuller discussion of linking verbs.)

An **auxiliary verb** is one that helps another verb and is used for showing tense, voice, and so on. A verb with its helpers is called a **verb phrase**. Verbs used as auxiliaries include *do*, *did*, *have*, *may*, *can*, *must*, *shall*, *might*, *could*, *would*, and *should*.

### 1.3.1 Verb Tenses

English has three simple verb tenses: present, past, and future.

| | |
|---|---|
| **Present:** | Our branches in Hawaii *stock* other items. |
| **Past:** | We *stocked* Purquil pens for a short time. |
| **Future:** | Rotex Tire Stores *will stock* your line of tires when you begin a program of effective national advertising. |

With most verbs (the regular ones), the past tense ends in *ed*, and the future tense always has *will* or *shall* in front of it. But the present tense is more complex, depending on the subject:

| | **First Person** | **Second Person** | **Third Person** |
|---|---|---|---|
| **Singular** | I stock | you stock | he/she/it stocks |
| **Plural** | we stock | you stock | they stock |

The basic form, *stock*, takes an additional *s* when *he, she*, or *it* precedes it. (See Section 1.3.4 for more on subject–verb agreement.)

In addition to the three simple tenses, the three **perfect tenses** are created by adding forms of the auxiliary verb *have*. The present perfect tense uses the past participle (regularly the past tense) of the main verb, *stocked*, and adds the present-tense *have* or *has* to the front of it:

(I, we, you, they) *have stocked*.

(He, she, it) *has stocked*.

The past perfect tense uses the past participle of the main verb, *stocked*, and adds the past-tense *had* to the front of it:

(I, you, he, she, it, we, they) *had stocked*.

The future perfect tense also uses the past participle of the main verb, *stocked*, but adds the future-tense *will have:*

(I, you, he, she, it, we, they) *will have stocked*.

Verbs should be kept in the same tense when the actions occur at the same time:

> When the payroll checks *came in*, everyone *showed up* for work.
>
> We *have found* that everyone *has pitched* in to help.

When the actions occur at different times, you may change tense accordingly:

> The shipment *came* last Wednesday, so if another one *comes* in today, please return it.
>
> The new employee *had been* ill at ease, but now she *has become* a full-fledged member of the team.

### 1.3.2 Irregular Verbs

Many verbs don't follow some of the standard patterns for verb tenses. The most irregular of these verbs is *to be:*

| **Tense** | **Singular** | **Plural** |
|---|---|---|
| **Present:** | I *am* | we *are* |
| | you *are* | you *are* |
| | he, she, it *is* | they *are* |
| **Past:** | I *was* | we *were* |
| | you *were* | you *were* |
| | he, she, it *was* | they *were* |

The future tense of *to be* is formed in the same way that the future tense of a regular verb is formed.

The perfect tenses of *to be* are also formed as they would be for a regular verb, except that the past participle is a special form, *been*, instead of just the past tense:

| | |
|---|---|
| **Present perfect:** | you have been |
| **Past perfect:** | you had been |
| **Future perfect:** | you will have been |

Here's a sampling of other irregular verbs:

| **Present** | **Past** | **Past Participle** |
|---|---|---|
| begin | began | begun |
| shrink | shrank | shrunk |
| know | knew | known |
| rise | rose | risen |
| become | became | become |
| go | went | gone |
| do | did | done |

Dictionaries list the various forms of other irregular verbs.

### 1.3.3 Transitive and Intransitive Verbs

Many people are confused by three particular sets of verbs:

| | | |
|---|---|---|
| lie/lay | sit/set | rise/raise |

Using these verbs correctly is much easier when you learn the difference between transitive and intransitive verbs.

**Transitive verbs** require a receiver; they "transfer" their action to an object. **Intransitive verbs** do not have a receiver for their action. Some intransitive verbs are complete in themselves and need no help from other words (prices *dropped*; we *won*). Other intransitive words must be "completed" by a noun or adjective called a **complement**. Complements occur with linking verbs.

Here are some sample uses of transitive and intransitive verbs:

| **Intransitive** | **Transitive** |
|---|---|
| We should include in our new offices a place to *lie* down for a nap. | The workers will be here on Monday to *lay* new carpeting. |
| Even the way an interviewee *sits* is important. | That crate is full of stemware, so *set* it down carefully. |
| Salaries at Compu-Link, Inc., *rise* swiftly. | They *raise* their level of production every year. |

The workers *lay* carpeting, you *set down* the crate, they *raise* production; each action is transferred to something. In the intransitive sentences, a person *lies down*, an interviewee *sits*, and salaries *rise* without affecting anything else. Intransitive sentences are complete with only a subject and a verb; transitive sentences are not complete unless they also include an object; or something to transfer the action to.

Tenses are a confusing element of the lie/lay problem:

| **Present** | **Past** | **Past Participle** |
|---|---|---|
| I *lie* | I *lay* | I *have lain* |
| I *lay* (something down) | I *laid* (something down) | I *have laid* (something down) |

The past tense of *lie* and the present tense of *lay* look and sound alike, even though they're different verbs.

### 1.3.4 Subject-Verb Agreement

Whether regular or irregular, every verb must agree with its subject, both in person (first, second, or third) and in number (single or plural).

| | **First Person** | **Second Person** | **Third Person** |
|---|---|---|---|
| **Singular** | I *am* | you *are* | he/she/it *is* |
| | I *write* | you *write* | he/she/it *writes* |
| **Plural** | we *are* | you *are* | they *are* |
| | we *write* | you *write* | they *write* |

In a simple sentence, making a verb agree with its subject is a straightforward task:

> Hector Ruiz *is* a strong competitor. (third-person singular)
>
> We *write* to you every month. (first-person plural)

Confusion sometimes arises when sentences are a bit more complicated. For example, be sure to avoid agreement problems when words come between the subject and verb. In the following examples, the verb appears in italics, and its subject is underlined:

The analysis of existing documents *takes* a full week.

Even though *documents* is a plural, the verb is in the singular form. That's because the subject of the sentence is *analysis*, a singular noun. The phrase *of existing documents* can be disregarded. Here is another example:

The answers for this exercise *are* in the study guide.

Take away the phrase *for this exercise* and you are left with the plural subject *answers*. Therefore, the verb takes the plural form.

Verb agreement is also complicated when the subject is a collective noun or pronoun or when the subject may be considered either singular or plural. In such cases, you often have to analyze the surrounding sentence to determine which verb form to use:

The staff *is* quartered in the warehouse.

The staff *are* at their desks in the warehouse.

The computers and the staff *are* in the warehouse.

Neither the staff nor the computers *are* in the warehouse.

Every computer *is* in the warehouse.

Many a computer *is* in the warehouse.

Did you notice that words such as *every* use the singular verb form? In addition, when an *either/or* or a *neither/nor* phrase combines singular and plural nouns, the verb takes the form that matches the noun closest to it.

In the business world, some subjects require extra attention. Company names, for example, are considered singular and therefore take a singular verb in most cases—even if they contain plural words:

Stater Brothers *offers* convenient grocery shopping.

In addition, quantities are sometimes considered singular and sometimes plural. If a quantity refers to a total amount, it takes a singular verb; if a quantity refers to individual, countable units, it takes a plural verb:

Three hours *is* a long time.

The eight dollars we collected for the fund *are* tacked on the bulletin board.

Fractions may also be singular or plural, depending on the noun that accompanies them:

One-third of the warehouse *is* devoted to this product line.

One-third of the products *are* defective.

To decide whether to use a singular or plural verb with subjects such as *number* and *variety*, follow this simple rule: If the subject is preceded by *a*, use a plural verb:

*A* number of products *are* being displayed at the trade show.

If the subject is preceded by *the*, use a singular verb:

*The* variety of products on display *is* mind-boggling.

For a related discussion, see Section 1.7.1, Longer Sentences.

### 1.3.5 Voice of Verbs

Verbs have two voices, active and passive. When the subject comes first, the verb is in **active voice**; when the object comes first, the verb is in **passive voice**:

**Active:** The buyer *paid* a large amount.

**Passive:** A large amount *was paid* by the buyer.

The passive voice uses a form of the verb *to be*, which adds words to a sentence. In the example, the passive-voice sentence uses eight words, whereas the active-voice sentence uses only six to say the same thing. The words *was* and *by* are unnecessary to convey the meaning of the sentence. In fact, extra words usually clog meaning. So be sure to opt for the active voice when you have a choice.

At times, however, you have no choice:

Several items *have been taken*, but so far we don't know who took them.

The passive voice becomes necessary when you don't know (or don't want to say) who performed the action; the active voice is bolder and more direct.

### 1.3.6 Mood of Verbs

Verbs can express one of three moods: indicative, imperative, or subjunctive. The **indicative mood** is used to make a statement or to ask a question:

The secretary mailed a letter to each supplier.

Did the secretary mail a letter to each supplier?

Use the **imperative mood** when you wish to command or request:

Please mail a letter to each supplier.

With the imperative mood, the subject is the understood *you*.

The **subjunctive mood** is used to express doubt or a wish or a condition contrary to fact:

If I *were* you, I wouldn't send that email.

The subjunctive is also used to express a suggestion or a request:

I asked that Rosario *be* [not *is*] present at the meeting.

### 1.3.7 Verbals

**Verbals** are verbs that are modified to function as other parts of speech. They include infinitives, gerunds, and participles.

**Infinitives** are formed by placing a *to* in front of the verb (*to go*, *to purchase*, *to work*). They function as nouns.

Although many of us were taught that it is "incorrect" to split an infinitive—that is, to place an adverb between the *to* and the verb—that rule is not a hard and fast one. In some cases, the adverb is best placed in the middle of the infinitive to avoid awkward constructions or ambiguous meaning:

> Production of steel is expected to *moderately exceed* domestic use.

**Gerunds** are verbals formed by adding *ing* to a verb (*going*, *having*, *working*). Like infinitives, they function as nouns. Gerunds and gerund phrases take a singular verb:

> *Borrowing* from banks *is* preferable to getting venture capital.

**Participles** are verb forms used as adjectives. The present participle ends in *ing* and generally describes action going on at the same time as other action:

> *Checking* the schedule, the contractor was pleased with progress on the project.

The **past participle** is usually the same form as the past tense and generally indicates completed action:

> When *completed*, the project will occupy six city blocks.

The **perfect participle** is formed by adding *having* to the past participle:

> *Having completed* the project, the contractor submitted his last invoice.

### Practice Session: Verbs

Underline the preferred choice within each set of parentheses in the following sentences.

1. When Hastings (*come, comes, came*) in, tell him I (*want, wanted*) to see him.
2. Even though Sheila (*knowed, knew*) the right password, she typed it incorrectly.
3. The presentation had not yet (*began, begun*) when Charles arrived.
4. What I always say is, let sleeping dogs (*lay, lie*).
5. The workers (*lay, laid*) the tile in the executive bathroom yesterday.
6. This is where the president of the board (*sits, sets*) during meetings.
7. Just (*sit, set*) the boxes down over there.
8. Do you think management will (*raise, rise*) prices across the board next week?
9. A list of promotions (*was, were*) posted on the company intranet.
10. The supervisor of the assembly-line workers (*is, are*) being replaced.
11. The committee (*is, are*) considering the proposal today.
12. The board and the committee (*is, are*) having a joint meeting on June 25.
13. Neither the board nor the committee (*is, are*) expected to approve the proposal.
14. Every member of the board (*is, are*) going to make a statement.
15. Katten and Associates (*represent, represents*) clients in the entertainment industry.
16. Five hours (*is, are*) all I can give you to get the project done.
17. Half of the vacant lots (*is, are*) already sold.
18. Half of the hall (*is, are*) reserved for the luncheon.
19. Mario suggested that the public relations department (*send, sends*) out a news release about the merger.
20. If I (*was, were*) CEO, I'd fire the whole accounting staff.

## 1.4 ADJECTIVES

An **adjective** modifies (tells something about) a noun or pronoun. Each of the following phrases says more about the noun or pronoun than the noun or pronoun would say alone:

| | |
|---|---|
| an *efficient* staff | a *heavy* price |
| *brisk* trade | *light* web traffic |

Adjectives modify nouns more often than they modify pronouns. When adjectives do modify pronouns, however, the sentence usually has a linking verb:

| | |
|---|---|
| They were *attentive*. | It looked *appropriate*. |
| He seems *interested*. | You are *skillful*. |

### 1.4.1 Types of Adjectives

Adjectives serve a variety of purposes. **Descriptive adjectives** express some quality belonging to the modified item (*tall*, *successful*, *green*). **Limiting** or **definitive adjectives**, on the other hand, point out the modified item or limit its meaning without expressing a quality. Types include:

- Numeral adjectives (*one*, *fifty*, *second*)
- Articles (*a*, *an*, *the*)
- Pronominal adjectives: pronouns used as adjectives (*his* desk, *each* employee)
- Demonstrative adjectives: *this*, *these*, *that*, *those* (*these* tires, *that* invoice)

**Proper adjectives** are derived from proper nouns:

| | |
|---|---|
| *Chinese* customs | *Orwellian* overtones |

**Predicate adjectives** complete the meaning of the predicate and are introduced by linking verbs:

| | |
|---|---|
| The location is *perfect*. | Prices are *high*. |

### 1.4.2 Comparative Degree

Most adjectives can take three forms: simple, comparative, and superlative. The simple form modifies a single noun or pronoun. Use the comparative form when comparing two items. When comparing three or more items, use the superlative form:

| Simple | Comparative | Superlative |
|---|---|---|
| hard | harder | hardest |
| safe | safer | safest |
| dry | drier | driest |

The comparative form adds *er* to the simple form, and the superlative form adds *est*. (The *y* at the end of a word changes to *i* before the *er* or *est* is added.)

A small number of adjectives are irregular, including these:

| Simple | Comparative | Superlative |
|---|---|---|
| good | better | best |
| bad | worse | worst |
| little | less | least |

When the simple form of an adjective has two or more syllables, you usually add *more* to form the comparative and *most* to form the superlative:

| Simple | Comparative | Superlative |
|---|---|---|
| useful | more useful | most useful |
| exhausting | more exhausting | most exhausting |
| expensive | more expensive | most expensive |

The most common exceptions are two-syllable adjectives that end in *y:*

| Simple | Comparative | Superlative |
|---|---|---|
| happy | happier | happiest |
| costly | costlier | costliest |

If you choose this option, change the *y* to *i* and tack *er* or *est* onto the end.

Some adjectives cannot be used to make comparisons because they themselves indicate the extreme. For example, if something is perfect, nothing can be more perfect. If something is unique or ultimate, nothing can be more unique or more ultimate.

### 1.4.3 Hyphenated Adjectives

Many adjectives used in the business world are actually combinations of words: *up-to-date* report, *last-minute* effort, *fifth-floor* suite, *well-built* engine. As you can see, they are hyphenated when they come before the noun they modify. However, when such word combinations come after the noun they modify, they are not hyphenated. In the following example, the adjectives appear in italics and the nouns they modify are underlined:

> The <u>report</u> is *up to date* because of our team's *last-minute* <u>efforts</u>.

Hyphens are not used when part of the combination is a word ending in *ly* (because that word is usually not an adjective). Hyphens are also omitted from word combinations that are used so frequently that readers are used to seeing the words together:

> We live in a *rapidly shrinking* world.
>
> Our *highly motivated* employees will be well paid.
>
> Please consider renewing your *credit card* account.
>
> Send those figures to our *data processing* department.
>
> Our new intern is a *high school* student.

## 1.5 ADVERBS

An **adverb** modifies a verb, an adjective, or another adverb:

| | |
|---|---|
| **Modifying a verb:** | Our marketing department works *efficiently*. |
| **Modifying an adjective:** | She was not dependable, although she was *highly* intelligent. |
| **Modifying another adverb:** | When signing new clients, he moved *extremely* cautiously. |

An adverb can be a single word (*clearly*), a phrase (*very clearly*), or a clause (*because it was clear*).

### 1.5.1 Types of Adverbs

**Simple adverbs** are simple modifiers:

> The door opened *automatically*.
>
> The order arrived *yesterday*.
>
> Top companies were *there*.

**Interrogative adverbs** ask a question:

> *Where* have you been?

**Conjunctive adverbs** connect clauses:

> The boardroom isn't available for the meeting; *however*, the conference room should be clear.
>
> We met all our sales goals for April; *therefore*, all sales reps will get a bonus.

Words frequently used as conjunctive adverbs include *however*, *nevertheless*, *therefore*, *similarly*, *thus*, and *meanwhile*.

**Negative adverbs** include *not*, *never*, *seldom*, *rarely*, *scarcely*, *hardly*, and similar words. Negative adverbs are powerful words and therefore do not need any help in conveying a negative thought. Avoid using double negatives like these:

> I don't want no mistakes.
> (Correct: "I don't want any mistakes," or "I want no mistakes.")
>
> They couldn't hardly read the report.
> (Correct: "They could hardly read the report," or "They couldn't read the report.")
>
> They scarcely noticed neither one.
> (Correct: "They scarcely noticed either one," or "They noticed neither one.")

### 1.5.2 Adverb-Adjective Confusion

Many adverbs are adjectives turned into adverbs by adding *ly: highly*, *extremely*, *officially*, *closely*, *really*. In addition, many words can be adjectives or adverbs, depending on their usage in a particular sentence:

| | |
|---|---|
| The *early* bird gets the worm. [adjective] | We arrived *early*. [adverb] |
| It was a *hard* decision. [adjective] | He hit the wall *hard*. [adverb] |

Because of this situation, some adverbs are difficult to distinguish from adjectives. For example, in the following sentences, is the underlined word an adverb or an adjective?

They worked well.

The baby is well.

In the first sentence, *well* is an adverb modifying the verb *worked*. In the second sentence, *well* is an adjective modifying the noun *baby*. You may find it helpful to remember that a *linking verb* (such as *is* in "The baby is well") connects an adjective to the noun it modifies. In contrast, an *action verb* is modified by an adverb:

| **Adjective** | **Adverb** |
|---|---|
| He is a *good* worker. (What kind of worker is he?) | He works *well*. (How does he work?) |
| It is a *real* computer. (What kind of computer is it?) | It *really* is a computer. (To what extent is it a computer?) |
| The traffic is *slow*. (What quality does the have?) | The traffic moves *slowly*. (How does the traffic traffic move?) |
| This food tastes *bad* without salt. (What quality does the food have?) | This food *badly* needs salt. (How much is it needed?) |

### 1.5.3 Comparative Degree

Like adjectives, adverbs can be used to compare items. Generally, the basic adverb is combined with *more* or *most*, just as long adjectives are. However, some adverbs have one-word comparative forms:

| **One Item** | **Two Items** | **Three Items** |
|---|---|---|
| quickly | more quickly | most quickly |
| sincerely | less sincerely | least sincerely |
| fast | faster | fastest |
| well | better | best |

### Practice Session: Adjectives and Adverbs

Underline the preferred choice within each set of parentheses in the following sentences.

1. I always choose the (*less, least*) expensive brand.
2. Which would be (*better, best*), the store brand or the generic brand?
3. This audit couldn't have come at a (*worse, worst*) time.
4. When it comes to data analysis, Claire is (*more competent, competenter*) than Alexander.
5. The ad agency's campaign for our new vitamin supplement is (*unique, very unique, most unique*), to say the least.
6. A corporation can benefit from a (*well written, well-written*) annual report.
7. The chairman's introductory message to the annual report was (*well written, well-written*).
8. Even a (*beautifully written, beautifully-written*) report can be hampered by poor design and production.
9. According to Bank of America, the number of mortgage applications from (lower-income, lower income) consumers has tripled in the past year.
10. Angela wasn't feeling (*good, well*), so she went home early.
11. Harrison and Martinez work (*good, well*) together.
12. We are (*real, really*) excited about next week's product launch.
13. Could this project be moving any more (*slow, slowly*) through the bureaucratic system?
14. We (*could hardly, couldn't hardly*) wait to see how the brochure had turned out.
15. Today TeKTech is (*more heavy, more heavily, most heavily*) involved in nanotechnology, compared to five years ago.

## 1.6 OTHER PARTS OF SPEECH

Nouns, pronouns, verbs, adjectives, and adverbs carry most of the meaning in a sentence. Four other parts of speech link them together in sentences: prepositions, conjunctions, articles, and interjections.

### 1.6.1 Prepositions

A **preposition** is a word or group of words that describes a relationship between other words in a sentence. A simple preposition is made up of one word: *of*, *in*, *by*, *above*, *below*. A *compound preposition* is made up of two prepositions: *out of*, *from among*, *except for*, *because of*.

A **prepositional phrase** is a group of words introduced by a preposition that functions as an adjective (an adjectival phrase) or as an adverb (adverbial phrase) by telling more about a pronoun, noun, or verb:

The shipment will be here *by next Friday*.

Put the mail *in the out-bin*.

Prepositional phrases should be placed as close as possible to the element they are modifying:

Shopping *on the Internet* can be confusing for the uninitiated. (*not* Shopping can be confusing for the uninitiated *on the Internet*.)

Some prepositions are closely linked with a verb. When using phrases such as *look up* and *wipe out*, keep them intact and do not insert anything between the verb and the preposition.

You may have been told that it is unacceptable to put a preposition at the end of a sentence. However, that is not a hard-and-fast rule, and trying to follow it can sometimes be a challenge. You can end a sentence with a preposition as along as the sentence sounds natural and as long as rewording the sentence would create awkward wording:

> I couldn't tell what they were interested in.
>
> What did she attribute it to?
>
> What are you looking for?

Avoid using unnecessary prepositions. In the following examples, the prepositions in parentheses should be omitted:

> All (of) the staff members were present.
>
> I almost fell off (of) my chair with surprise.
>
> Where was Mr. Steuben going (to)?
>
> They couldn't help (from) wondering.

The opposite problem is failing to include a preposition when you should. Consider these two sentences:

> Sales were over $100,000 for Linda and Bill.
>
> Sales were over $100,000 for Linda and for Bill.

The first sentence indicates that Linda and Bill had combined sales over $100,000; the second, that Linda and Bill each had sales over $100,000, for a combined total in excess of $200,000. The preposition *for* is critical here.

When the same preposition can be used for two or more words in a sentence without affecting the meaning, only the last preposition is required:

> We are familiar (with) and satisfied with your company's products.

But when different prepositions are normally used with the words, all the prepositions must be included:

> We are familiar with and interested in your company's products.

Some prepositions have come to be used in a particular way with certain other parts of speech. Here is a partial list of some prepositions that have come to be used with certain words:

| | |
|---|---|
| according to | independent of |
| agree to (a proposal) | inferior to |
| agree with (a person) | plan to |
| buy from | prefer to |
| capable of | prior to |
| comply with | reason with |
| conform to | responsible for |
| differ from (things) | similar to |
| differ with (person) | talk to (without interaction) |
| different from | talk with (with interaction) |
| get from (receive) | wait for (person or thing) |
| get off (dismount) | wait on (like a waiter) |

If you are unsure of the correct idiomatic expression, check a dictionary.

Some verb-preposition idioms vary depending on the situation: You agree *to* a proposal but *with* a person, *on* a price, or *in* principle. You argue *about* something, *with* a person, and *for* or *against* a proposition. You compare one item *to* another to show their similarities; you compare one item *with* another to show differences.

Here are some other examples of preposition usage that have given writers trouble:

> **among/between:** *Among* is used to refer to three or more (Circulate the memo *among* the staff); *between* is used to refer to two (Put the copy machine *between* Judy and Dan).
>
> **as if/like:** *As if* is used before a clause (It seems *as if* we should be doing something); *like* is used before a noun or pronoun (He seems *like* a nice guy).
>
> **have/of:** *Have* is a verb used in verb phrases (They should *have* checked first); *of* is a preposition and is never used in such cases.
>
> **in/into:** *In* is used to refer to a static position (The file is *in* the cabinet); *into* is used to refer to movement toward a position (Put the file *into* the cabinet).

### 1.6.2 Conjunctions

**Conjunctions** connect the parts of a sentence: words, phrases, and clauses. A **coordinating conjunction** connects two words, phrases, or clauses of equal rank. The simple coordinating conjunctions include *and*, *but*, *or*, *nor*, *for*, *yet*, and *so*. **Correlative conjunctions** are coordinating conjunctions used in pairs: *both/and*, *either/or*, *neither/nor*, *not only/but also*. Constructions with correlative conjunctions should be parallel, with the same part of speech following each element of the conjunction:

> The purchase was *not only* expensive *but also* unnecessary.
>
> The purchase *not only was* expensive *but also was* unnecessary.

**Conjunctive adverbs** are adverbs used to connect or show relationships between clauses. They include *however*, *nevertheless*, *consequently*, *moreover*, and *as a result*.

A **subordinate conjunction** connects two clauses of unequal rank; it joins a dependent (subordinate) clause to the independent clause on which it depends (for more on dependent and independent clauses, see Section 1.7.1). Subordinate conjunctions include *as*, *if*, *because*, *although*, *while*, *before*, *since*, *that*, *until*, *unless*, *when*, *where*, and *whether*.

### 1.6.3 Articles and Interjections

Only three **articles** exist in English: *the*, *a*, and *an*. These words are used, like adjectives, to specify which item you are talking about. *The* is called the *definite article* because it indicates a specific noun; *a* and *an* are called the *indefinite articles* because they are less specific about what they are referring to.

If a word begins with a vowel (soft) sound, use *an;* otherwise, use *a*. It's *a history*, not *an history*, *a hypothesis*, not *an hypothesis*. Use *an* with an "h" word only if it is a soft "h," as in *honor* and *hour*. Use *an* with words that are pronounced with a soft vowel sound even if they are spelled beginning with a consonant (usually in the case of abbreviations): *an SEC application, an MP3 file*. Use *a* with words that begin with vowels if they are pronounced with a hard sound: *a university, a Usenet account*.

Repeat an article if adjectives modify different nouns: *The red house and the white house are mine*. Do not repeat an article if all adjectives modify the same noun: *The red and white house is mine*.

**Interjections** are words that express no solid information, only emotion:

| | |
|---|---|
| Wow! | Well, well! |
| Oh, no! | Good! |

Such purely emotional language has its place in private life and advertising copy, but it only weakens the effect of most business writing.

### Practice Session: Prepositions, Conjunctions, Articles, and Interjections

Circle the letter of the preferred choice in each pair of sentences.

1. **A.** If we want to have the project done next week, we'll need those balance sheets by Wednesday.
   **B.** If we want to have the project done next week, by Wednesday we'll need those balance sheets.
2. **A.** From where did that information come?
   **B.** Where did that information come from?
3. **A.** Please look up the shipping rates for packages to France.
   **B.** Please look the shipping rates up for packages to France.
4. **A.** You need to indicate the type job you're seeking.
   **B.** You need to indicate the type of job you're seeking.
5. **A.** Michael got the actuarial data off of the Internet.
   **B.** Michael got the actuarial data off the Internet.
6. **A.** When the meeting is over, Michelle will prepare the minutes.
   **B.** When the meeting is over with, Michelle will prepare the minutes.
7. **A.** Sharon is familiar and knowledgeable about HTML coding.
   **B.** Sharon is familiar with and knowledgeable about HTML coding.
8. **A.** We'll be deciding among the four applicants this afternoon.
   **B.** We'll be deciding between the four applicants this afternoon.
9. **A.** Because Marshall isn't here, it looks like the conference call will have to be canceled.
   **B.** Because Marshall isn't here, it looks as if the conference call will have to be canceled.
10. **A.** I would have had the memo done sooner, but my computer crashed.
    **B.** I would of had the memo done sooner, but my computer crashed.
11. **A.** When we have the survey results, we can put them in the report.
    **B.** When we have the survey results, we can put them into the report.
12. **A.** If you agree with the settlement, I can prepare the final papers.
    **B.** If you agree to the settlement, I can prepare the final papers.
13. **A.** It is important that you provide not only your name but also your address and telephone number.
    **B.** It is important that you provide not only your name but also address and telephone number.
14. **A.** The conference will be held in either March or July.
    **B.** The conference will be held either in March or July.
15. **A.** Please prepare an RFP for the construction job.
    **B.** Please prepare a RFP for the construction job.

## 1.7 SENTENCES

Sentences are constructed with the major building blocks, the parts of speech. Take, for example, this simple two-word sentence:

Money talks.

It consists of a noun (*money*) and a verb (*talks*). When used in this way, the noun works as the first requirement for a sentence, the **subject**, and the verb works as the second requirement, the **predicate**. Without a subject (who or what does something) and a predicate (the doing of it), you have merely a collection of words, not a sentence.

### 1.7.1 Longer Sentences

More complicated sentences have more complicated subjects and predicates, but they still have a simple subject and a predicate verb. In the following examples, the subject is underlined once, the predicate verb twice:

Marex and Contron enjoy higher earnings each quarter.

*Marex* [and] *Contron* do something; *enjoy* is what they do.

My interview, coming minutes after my freeway accident, did not impress or move anyone.

*Interview* is what did something. What did it do? It *did* [not] *impress* [or] *move*.

In terms of usable space, a steel warehouse, with its extremely long span of roof unsupported by pillars, makes more sense.

*Warehouse* is what *makes*.

These three sentences demonstrate several things. First, in all three sentences, the simple subject and predicate verb are the "bare bones" of the sentence, the parts that carry the core idea of the sentence. When trying to find the subject and predicate verb, disregard all prepositional phrases, modifiers, conjunctions, and articles.

Second, in the third sentence, the verb is singular (*makes*) because the subject is singular (*warehouse*). Even though the plural noun *pillars* is closer to the verb, *warehouse* is the subject. So *warehouse* determines whether the verb is singular or plural. Subject and predicate must agree.

Third, the subject in the first sentence is compound (*Marex* [and] *Contron*). A compound subject, when connected by *and*, requires a plural verb (*enjoy*). Also, the second sentence shows how compound predicates can occur (*did* [not] *impress* [or] *move*).

Fourth, the second sentence incorporates a group of words—*coming minutes after my freeway accident*—containing a form of a verb (*coming*) and a noun (*accident*). Yet, this group of words is not a complete sentence for two reasons:

- **Not all nouns are subjects:** *Accident* is not the subject of *coming*.
- **Not all verbs are predicates:** A verb that ends in *ing* can never be the predicate of a sentence (unless preceded by a form of *to be*, as in *was coming*).

Because they don't contain a subject and a predicate, the words *coming minutes after my freeway accident* (called a **phrase**) can't be written as a sentence. That is, the phrase cannot stand alone; it cannot begin with a capital letter and end with a period. So a phrase must always be just one part of a sentence.

Sometimes a sentence incorporates two or more groups of words that do contain a subject and a predicate; these word groups are called **clauses**:

> My interview, because it came minutes after my freeway accident, did not impress or move anyone.

The **independent clause** is the portion of the sentence that could stand alone without revision:

> My *interview* did not impress or move anyone.

The other part of the sentence could stand alone only by removing *because*:

> (because) It came minutes after my freeway accident.

This part of the sentence is known as a **dependent clause**; although it has a subject and a predicate (just as an independent clause does), it's linked to the main part of the sentence by a word (*because*) showing its dependence.

In summary, the two types of clauses—dependent and independent—both have a subject and a predicate. Dependent clauses, however, do not bear the main meaning of the sentence and are therefore linked to an independent clause. Nor can phrases stand alone, because they lack both a subject and a predicate. Only independent clauses can be written as sentences without revision.

### 1.7.2 Types of Sentences

Sentences come in four main types, depending on the extent to which they contain clauses. A **simple sentence** has one subject and one predicate; in short, it has one main independent clause:

> Boeing is the world's largest aerospace company.

A **compound sentence** consists of two independent clauses connected by a coordinating conjunction (*and*, *or*, *but*, etc.) or a semicolon:

> Airbus outsold Boeing for several years, but Boeing has recently regained the lead.

A **complex sentence** consists of an independent clause and one or more dependent clauses:

> Boeing is betting [independent clause] that airlines will begin using moderately smaller planes to fly passengers between smaller cities [dependent clause introduced by *that*].

A **compound-complex sentence** has two main clauses, at least one of which contains a subordinate (dependent clause):

> Boeing is betting [independent clause] that airlines will begin using moderately smaller planes to fly passengers between smaller cities [dependent clause], and it anticipates that new airports will be developed to meet passenger needs [independent clause].

### 1.7.3 Sentence Fragments

An incomplete sentence (a phrase or a dependent clause) that is written as though it were a complete sentence is called a **fragment**. Consider the following sentence fragments:

> Marilyn Sanders, having had pilferage problems in her store for the past year. Refuses to accept the results of our investigation.

This serious error can easily be corrected by putting the two fragments together:

> Marilyn Sanders, having had pilferage problems in her store for the past year, refuses to accept the results of our investigation.

The actual details of a situation will determine the best way for you to remedy a fragment problem.

The ban on fragments has one exception. Some advertising copy contains sentence fragments, written knowingly to convey a certain rhythm. However, advertising is the only area of business in which fragments are acceptable.

### 1.7.4 Fused Sentences and Comma Splices

Just as there can be too little in a group of words to make it a sentence, there can also be too much:

> All our mail is run through a postage meter every afternoon someone picks it up.

This example contains two sentences, not one, but the two have been blended so that it's hard to tell where one ends and the next begins. Is the mail run through a meter every afternoon? If so, the sentences should read:

> All our mail is run through a postage meter every afternoon. Someone picks it up.

Perhaps the mail is run through a meter at some other time (morning, for example) and is picked up every afternoon:

> All our mail is run through a postage meter. Every afternoon someone picks it up.

The order of words is the same in all three cases; sentence division makes all the difference. Either of the last two cases is grammatically correct. The choice depends on the facts of the situation.

Sometimes these so-called **fused sentences** have a more obvious point of separation:

> Several large orders arrived within a few days of one another, too many came in for us to process by the end of the month.

Here, the comma has been put between two independent clauses in an attempt to link them. When a lowly comma separates two complete sentences, the result is called a **comma splice**. A comma splice can be remedied in one of three ways:

- **Replace the comma with a period and capitalize the next word:** ". . . one another. Too many . . ."
- **Replace the comma with a semicolon and do not capitalize the next word:** ". . . one another; too many . . ." This remedy works only when the two sentences have closely related meanings.
- **Change one of the sentences so that it becomes a phrase or a dependent clause.** This remedy often produces the best writing, but it takes more work.

The third alternative can be carried out in several ways. One is to begin the sentence with a subordinating conjunction:

> Whenever several large orders arrived within a few days of one another, too many came in for us to process by the end of the month.

Another way is to remove part of the subject or the predicate verb from one of the independent clauses, thereby creating a phrase:

> Several large orders arrived within a few days of one another, too many for us to process by the end of the month.

Finally, you can change one of the predicate verbs to its *ing* form:

> Several large orders arrived within a few days of one another, too many coming in for us to process by the end of the month.

In many cases, simply adding a coordinating conjunction can separate fused sentences or remedy a comma splice:

> You can fire them, or you can make better use of their abilities.

> Margaret drew up the designs, and Matt carried them out.

> We will have three strong months, but after that sales will taper off.

Be careful with coordinating conjunctions: Use them only to join simple sentences that express similar ideas.

Also, because they say relatively little about the relationship between the two clauses they join, avoid using coordinating conjunctions too often: *and* is merely an addition sign; *but* is just a turn signal; *or* only points to an alternative. Subordinating conjunctions such as *because* and *whenever* tell the reader a lot more.

### 1.7.5 Sentences with Linking Verbs

Linking verbs were discussed briefly in the section on verbs (Section 1.3). Here, you can see more fully the way they function in a sentence. The following is a model of any sentence with a linking verb:

> A *(verb)* B.

Although words such as *seems* and *feels* can also be linking verbs, let's assume that the verb is a form of *to be:*

> A *is* B.

In such a sentence, A and B are always nouns, pronouns, or adjectives. When one is a noun and the other is a pronoun, or when both are nouns, the sentence says that one is the same as the other:

> She is president.

> Rachel is president.

> She is forceful.

Recall from Section 1.3.3 that the noun or adjective that follows the linking verb is called a *complement*. When it is a noun or noun phrase, the complement is called a *predicate nominative*, when the complement is an adjective, it is referred to as a *predicate adjective*.

### 1.7.6 Misplaced Modifiers

The position of a modifier in a sentence is important. The movement of *only* changes the meaning in the following sentences:

> Only we are obliged to supply those items specified in your contract.

> We are obliged only to supply those items specified in your contract.

> We are obliged to supply only those items specified in your contract.

> We are obliged to supply those items specified only in your contract.

In any particular set of circumstances, only one of those sentences would be accurate. The others would very likely cause problems. To prevent misunderstanding, place such modifiers as close as possible to the noun or verb they modify.

For similar reasons, whole phrases that are modifiers must be placed near the right noun or verb. Mistakes in placement create ludicrous meanings:

> Antia Information Systems bought new computer chairs for the programmers with more comfortable seats.

The anatomy of programmers is not normally a concern of business writers. Obviously, the comfort of the chairs was the issue:

> Antia Information Systems bought programmers the new computer chairs with more comfortable seats.

Here is another example:

> I asked him to file all the letters in the cabinet that had been answered.

In this ridiculous sentence, the cabinet has been answered, even though no cabinet in history is known to have asked a question. *That had been answered* is too far from *letters* and too close to *cabinet*. Here's an improvement:

> I asked him to file in the cabinet all the letters that had been answered.

The term **dangling modifier** is often used to refer to a clause or phrase that because of its position in the sentence seems to modify a word that it is not meant to modify. For instance:

> Lying motionless, co-workers rushed to Barry's aid.

Readers expect an introductory phrase to modify the subject of the main clause. But in this case it wasn't the *co-workers* who were lying motionless but rather *Barry* who was in this situation. Like this example, most instances of dangling modifiers occur at the beginning of sentences. The source of some danglers is a passive construction:

> To find the needed information, the whole book had to be read.

In such cases, switching to the active voice can usually remedy the problem:

> To find the needed information, you will need to read the whole book.

### 1.7.7 Parallelism

Two or more sentence elements that have the same relation to another element should be in the same form. Otherwise, the reader is forced to work harder to understand the meaning of the sentence. When a series consists of phrases or clauses, the same part of speech (preposition, gerund, etc.) should introduce them. Do not mix infinitives with participles or adjectives with nouns. Here are some examples of nonparallel elements:

> Andersen is hiring managers, programmers, and people who work in accounting. [nouns not parallel]
>
> Andersen earns income by auditing, consulting, and by bookkeeping. [prepositional phrases not parallel]
>
> Andersen's goals are to win new clients, keeping old clients happy, and finding new enterprises. [infinitive mixed with gerunds]

### Practice Session: Sentences

Circle the letter of the preferred choice in each group of sentences.

**1. A.** Cyberterrorism—orchestrated attacks on a company's information systems for political or economic purposes—is a very real threat.
**B.** Cyberterrorism—orchestrated attacks on a company's information systems for political or economic purposes—are a very real threat.

**2. A.** Email, phone calls, and IM messages, each one a distraction, interrupts employees when they work.
**B.** Email, phone calls, and IM messages, each one a distraction, interrupt employees when they work.

**3. A.** About 35 percent of major U.S. companies keep tabs on workers. Because they want to protect valuable company information.
**B.** About 35 percent of major U.S. companies keep tabs on workers because they want to protect valuable company information.
**C.** About 35 percent of major U.S. companies keep tabs on workers; because they want to protect valuable company information.

**4. A.** Despite its small size and relative isolation in the Arctic Circle. Finland leads the pack in mobile phone technology and its applications.
**B.** Despite its small size and relative isolation in the Arctic Circle; Finland leads the pack in mobile phone technology and its applications.
**C.** Despite its small size and relative isolation in the Arctic Circle, Finland leads the pack in mobile phone technology and its applications.

**5. A.** Many employees erroneously believe that their email and voicemail messages are private they're surprised when email ends up in places where they did not intend it to go.
**B.** Many employees erroneously believe that their email and voicemail messages are private, they're surprised when email ends up in places where they did not intend it to go.
**C.** Many employees erroneously believe that their email and voicemail messages are private, so they're surprised when email ends up in places where they did not intend it to go.

**6. A.** Each day people in the United States treat themselves to more than 3 million Krispy Kreme doughnuts, they buy more than 11,000 dozen of those doughnuts every hour.
**B.** Each day people in the United States treat themselves to more than 3 million Krispy Kreme doughnuts, buying more than 11,000 dozen of those doughnuts every hour.

**7. A.** The procedure for making Krispy Kreme doughnuts takes about an hour, the manufacturing process begins long before local stores crank up their production lines.

**B.** The procedure for making Krispy Kreme doughnuts takes about an hour; the manufacturing process begins long before local stores crank up their production lines.

**C.** The procedure for making Krispy Kreme doughnuts takes about an hour. But the manufacturing process begins long before local stores crank up their production lines.

**8. A.** After blending the ingredients, the doughnut mix is stored in Krispy Kreme's warehouse for a week.

**B.** After blending the ingredients, Krispy Kreme's warehouse is used to store the doughnut mix for a week.

**C.** After the ingredients have been blended, the doughnut mix is stored in Krispy Kreme's warehouse for a week.

**9. A.** Using computer-aided design, our engineers customize every bike to meet the rider's size and component preferences.

**B.** Our engineers customize every bike with computer-aided design to meet the rider's size and component preferences

**10. A.** Catering to its customers, about 2,000 bikes are built annually by Green Gear Cycling.

**B.** Catering to its customers, about 2,000 bikes are built by Green Gear Cycling annually.

**C.** Catering to its customers, Green Gear Cycling builds about 2,000 bikes annually.

# 2.0 Punctuation

On the highway, signs tell you when to slow down or stop, where to turn, and when to merge. In similar fashion, punctuation helps readers negotiate your prose. The proper use of punctuation keeps readers from losing track of your meaning.

## 2.1 PERIODS

Use a period (1) to end any sentence that is not a question, (2) with certain abbreviations, and (3) between dollars and cents in an amount of money.

## 2.2 QUESTION MARKS

Use a question mark after any direct question that requests an answer:

> Are you planning to enclose a check, or shall we bill you?

Don't use a question mark with commands phrased as questions for the sake of politeness:

> Will you send us a check today.

A question mark should precede quotation marks, parentheses, and brackets if it is part of the quoted or parenthetical material; otherwise, it should follow:

> This issue of *Inc*. has an article titled "What's Your Entrepreneurial IQ?"

> Have you read the article "Five Principles of Guerrilla Marketing"?

Do not use the question mark with indirect questions or with requests:

> Mr. Antonelli asked whether anyone had seen Nathalia lately.

Do not use a comma or a period with a question mark; the question mark takes the place of these punctuation marks.

## 2.3 EXCLAMATION POINTS

Use exclamation points after highly emotional language. Because business writing almost never calls for emotional language, you will seldom use exclamation points.

## 2.4 SEMICOLONS

Semicolons have three main uses. One is to separate two closely related independent clauses:

> The outline for the report is due within a week; the report itself is due at the end of the month.

A semicolon should also be used instead of a comma when the items in a series have commas within them:

> Our previous meetings were on November 11, 2012; February 20, 2013; and April 28, 2015.

Finally, a semicolon should be used to separate independent clauses when the second one begins with a conjunctive adverb such as *however*, *therefore*, or *nevertheless* or a phrase such as *for example* or *in that case:*

> Our supplier has been out of part D712 for 10 weeks; however, we have found another source that can ship the part right away.

> His test scores were quite low; on the other hand, he has a lot of relevant experience.

Section 4.4 provides more information on using transitional words and phrases.

Semicolons should always be placed outside parentheses:

> Events Northwest has the contract for this year's convention (August 23–28); we haven't awarded the contract for next year yet.

## 2.5 COLONS

Use a colon after the salutation in a business letter. You should also use a colon at the end of a sentence or phrase introducing a list or (sometimes) a quotation:

> Our study included the three most critical problems: insufficient capital, incompetent management, and inappropriate location.

A colon should not be used when the list, quotation, or idea is a direct object of the verb or preposition. This rule applies whether the list is set off or run in:

> We are able to supply
>
> staples
> wood screws
> nails
> toggle bolts
>
> This shipment includes 9 DVDs, 12 CDs, and 4 USB flash drives.

Another way you can use a colon is to separate the main clause and another sentence element when the second explains, illustrates, or amplifies the first:

> Management was unprepared for the union representatives' demands: this fact alone accounts for their arguing well into the night.

However, in contemporary usage, such clauses are frequently separated by a semicolon.

Like semicolons, colons should always be placed outside parentheses:

> He has an expensive list of new demands (none of which is covered in the purchase agreement): new carpeting, network cabling, and a new security system.

### Practice Session: Punctuation 1

Circle the letter of the preferred choice in the following groups of sentences.

1. **A.** She asked me whether we should increase our insurance coverage?
   **B.** She asked me whether we should increase our insurance coverage.
2. **A.** Would you please let me know when the copier is free.
   **B.** Would you please let me know when the copier is free?
3. **A.** You won't want to miss this exciting seminar!
   **B.** You won't want to miss this exciting seminar.
4. **A.** The officers of the board of directors are John Rogers, president, Robin Doug Donlan, vice president for programming, Bill Pittman, vice president for operations, and Mary Sturhann, secretary.
   **B.** The officers of the board of directors are John Rogers, president; Robin Doug Donlan, vice president for programming; Bill Pittman, vice president for operations; and Mary Sturhann, secretary.
   **C.** The officers of the board of directors are John Rogers, president; Robin Doug Donlan, vice president for programming; Bill Pittman, vice president for operations, and Mary Sturhann, secretary.
5. **A.** Edward Jones is the best brokerage house in America; it has more offices than any other brokerage house.
   **B.** Edward Jones is the best brokerage house in America, it has more offices than any other brokerage house.
6. **A.** One of the SEC's top priorities is to crack down on insider trading, however it readily admits that it has not been very successful to date.
   **B.** One of the SEC's top priorities is to crack down on insider trading; however, it readily admits that it has not been very successful to date.
7. **A.** To keep on top of financial news, you should consult three newspapers aimed specifically at investors: *The Wall Street Journal*, *Investor's Business Daily*, and *Barron's*.
   **B.** To keep on top of financial news, you should consult three newspapers aimed specifically at investors; such as, *The Wall Street Journal*, *Investor's Business Daily*, and *Barron's*.
   **C.** To keep on top of financial news, you should consult three newspapers aimed specifically at investors; such as *The Wall Street Journal*, *Investor's Business Daily*, and *Barron's*.
8. **A.** I wonder if it is appropriate to call John's clients while he is on vacation.
   **B.** I wonder if it is appropriate to call John's clients while he is on vacation?
9. **A.** The three basic concepts that guide accountants are: the fundamental accounting equation, double-entry bookkeeping, and the matching principle.
   **B.** The three basic concepts that guide accountants are the fundamental accounting equation, double-entry bookkeeping, and the matching principle.
   **C.** The three basic concepts that guide accountants are the fundamental accounting equation; double-entry bookkeeping; and the matching principle.
10. **A.** Accountants are guided by three basic concepts, the fundamental accounting equation, double-entry bookkeeping, and the matching principle.
    **B.** Accountants are guided by three basic concepts: the fundamental accounting equation; double-entry bookkeeping; and the matching principle.
    **C.** Accountants are guided by three basic concepts: the fundamental accounting equation, double-entry bookkeeping, and the matching principle.

## 2.6 COMMAS

Commas have many uses; the most common is to separate items in a series:

> He took the job, learned it well, worked hard, and succeeded.
>
> Put paper, pencils, and paper clips on the requisition list.

Company style may dictate omitting the final comma in a series. However, if you have a choice, use the final comma; it's often necessary to prevent misunderstanding.

A second place to use a comma is between independent clauses that are joined by a coordinating conjunction (*and*, *but*, or *or*):

She spoke to the sales staff, and he spoke to the production staff.

I was advised to proceed, and I did.

A third use for the comma is to separate a dependent clause at the beginning of a sentence from an independent clause:

Because of our lead in the market, we may be able to risk introducing a new product.

However, a dependent clause at the end of a sentence is separated from the independent clause by a comma only when the dependent clause is unnecessary to the main meaning of the sentence:

We may be able to introduce a new product, although it may involve some risk.

A fourth use for the comma is after an introductory phrase or word:

Starting with this amount of capital, we can survive in the red for one year.

Through more careful planning, we may be able to serve more people.

Yes, you may proceed as originally planned.

However, with short introductory prepositional phrases and some one-syllable words (such as *hence* and *thus*), the comma is often omitted:

Before January 1 we must complete the inventory.

Thus we may not need to hire anyone.

In July we will complete the move to Tulsa.

Fifth, paired commas are used to set off nonrestrictive clauses and phrases. A **restrictive clause** is one that cannot be omitted without altering the meaning of the main clause, whereas a **nonrestrictive clause** can be:

The *Time* magazine website, which is produced by Steve Conley, has won several design awards. [nonrestrictive: the material set off by commas could be omitted]

The website that is produced by Steve Conley has won several design awards. [restrictive: no commas are used before and after *that is produced by Steve Conley* because this information is necessary to the meaning of the sentence—it specifies which website]

A sixth use for commas is to set off appositive words and phrases. (An **appositive** has the same meaning as the word it is in apposition to.) Like nonrestrictive clauses, appositives can be dropped without changing or obscuring the meaning of the sentence:

Conley, a freelance designer, also produces the websites for several nonprofit corporations.

Seventh, commas are used between adjectives modifying the same noun (coordinate adjectives):

She left Monday for a long, difficult recruiting trip.

To test the appropriateness of such a comma, try reversing the order of the adjectives: *a difficult, long recruiting trip*. If the order cannot be reversed, leave out the comma (a *good old friend* isn't the same as an *old good friend*). A comma should not be used when one of the adjectives is part of the noun. Compare these two phrases:

a distinguished, well-known figure

a distinguished public figure

The adjective-noun combination of *public* and *figure* has been used together so often that it has come to be considered a single thing: *public figure*. So no comma is required.

Eighth, commas are used both before and after the year in sentences that include month, day, and year:

It will be sent by December 15, 2016, from our Cincinnati plant.

Some companies use the European style: 15 December 2016. No commas should be used in that case. Nor is a comma needed when only the month and year are present (December 2016).

Ninth, commas are used to set off a variety of parenthetical words and phrases within sentences, including state names, dates, abbreviations, transitional expressions, and contrasted elements:

They were, in fact, prepared to submit a bid.

Habermacher, Inc., went public in 1999.

Our goal was increased profits, not increased market share.

Service, then, is our main concern.

The factory was completed in Chattanooga, Tennessee, just three weeks ago.

Joanne Dubiik, M.D., has applied for a loan from First Savings.

I started work here on March 1, 2003, and soon received my first promotion.

Tenth, a comma is used to separate a quotation from the rest of the sentence:

Your warranty reads, "These conditions remain in effect for one year from date of purchase."

However, the comma is left out when the quotation as a whole is built into the structure of the sentence:

He hurried off with an angry "Look where you're going."

Finally, a comma should be used whenever it's needed to avoid confusion or an unintended meaning. Compare the following:

> Ever since they have planned new ventures more carefully.
>
> Ever since, they have planned new ventures more carefully.

## 2.7 DASHES

Use dashes to surround a comment that is a sudden turn in thought:

> Membership in the IBSA—it's expensive but worth it—may be obtained by applying to our New York office.

A dash can also be used to emphasize a parenthetical word or phrase:

> Third-quarter profits—in excess of $2 million—are up sharply.

Finally, use dashes to set off a phrase that contains commas:

> All our offices—Milwaukee, New Orleans, and Phoenix—have sent representatives.

Don't confuse a dash with a hyphen. A dash separates and emphasizes words, phrases, and clauses more strongly than commas or parentheses can; a hyphen ties two words so tightly that they almost become one word.

When using a computer, use the em dash symbol. When typing a dash in email, type two hyphens with no space before, between, or after.

A second type of dash, the en dash, can be produced with computer word processing and page-layout programs. This kind of dash is shorter than the regular dash and longer than a hyphen. It is reserved almost exclusively for indicating "to" or "through" with numbers such as dates and pages: *2013–2014, pages 30–44*.

## 2.8 HYPHENS

Hyphens are mainly used in three ways. The first is to separate the parts of compound words beginning with such prefixes as *self-, ex-, quasi-*, and *all-*:

| | |
|---|---|
| self-assured | quasi-official |
| ex-wife | all-important |

However, do not use hyphens in words that have prefixes such as *pro, anti, non, re, pre, un, inter*, and *extra*:

| | |
|---|---|
| prolabor | nonunion |
| antifascist | interdepartmental |

Exceptions occur when (1) the prefix occurs before a proper noun or (2) the vowel at the end of the prefix is the same as the first letter of the root word:

| | |
|---|---|
| pro-Republican | anti-American |
| anti-inflammatory | extra-atmospheric |

When in doubt, consult your dictionary.

Hyphens are used in some types of spelled-out numbers. For instance, they are used to separate the parts of a spelled-out number from *twenty-one* to *ninety-nine* and for spelled-out fractions: *two-thirds, one-sixth* (although some style guides say not to hyphenate fractions used as nouns).

Certain compound nouns are formed by using hyphens: *secretary-treasurer, city-state*. Check your dictionary for compounds you're unsure about.

Hyphens are also used in some compound adjectives, which are adjectives made up of two or more words. Specifically, you should use hyphens in compound adjectives that come before the noun:

| | |
|---|---|
| an interest-bearing account | well-informed executives |

However, you need not hyphenate when the adjective follows a linking verb:

> This account is interest bearing.
>
> Their executives are well informed.

You can shorten sentences that list similar hyphenated words by dropping the common part from all but the last word:

> Check the costs of first-, second-, and third-class postage.

Finally, hyphens may be used to divide words at the end of a typed line. Such hyphenation is best avoided, but when you have to divide words at the end of a line, do so correctly (see Section 3.5). Dictionaries show how words are divided into syllables.

## 2.9 APOSTROPHES

Use an apostrophe in the possessive form of noun (but not in a pronoun):

> On his desk was a reply to Bette *Ainsley's* application for the *manager's* position.

Apostrophes are also used in place of the missing letter(s) of a contraction:

| **Whole Words** | **Contraction** |
|---|---|
| we will | we'll |
| do not | don't |
| they are | they're |

## 2.10 QUOTATION MARKS

Use quotation marks to surround words that are repeated exactly as they were said or written:

> The collection letter ended by saying, "This is your third and final notice."

Remember: (1) When the quoted material is a complete sentence, the first word is capitalized. (2) The final comma or period goes inside the closing quotation marks.

Quotation marks are also used to set off the title of a newspaper story, magazine article, or book chapter:

> You should read "Legal Aspects of the Collection Letter" in *Today's Credit*.

Quotation marks may also be used to indicate special treatment for words or phrases, such as terms that you're using in an unusual or ironic way:

> Our management "team" spends more time squabbling than working to solve company problems.

When you are defining a word, put the definition in quotation marks:

> The abbreviation *etc.* means "and so forth."

When using quotation marks, take care to insert the closing marks as well as the opening ones.

Although periods and commas go inside any quotation marks, colons and semicolons generally go outside them. A question mark goes inside the quotation marks only if the quotation is a question:

> All that day we wondered, "Is he with us?"

If the quotation is not a question but the entire sentence is, the question mark goes outside:

> What did she mean by "You will hear from me"?

For quotes within quotes, use single quotation marks within double:

> As David Pottruck, former co-CEO of Charles Schwab, told it, "I assembled about 100 managers at the base of the Golden Gate Bridge and gave them jackets emblazoned with the phrase 'Crossing the Chasm' and then led them across the bridge."

Otherwise, do not use single quotation marks for anything, including titles of works—that's British style.

## 2.11 PARENTHESES AND BRACKETS

Use parentheses to surround comments that are entirely incidental or to supply additional information:

> Our figures do not match yours, although (if my calculations are correct) they are closer than we thought.

> Sally Wagner (no relation to our own John Wagner) was just promoted to general manager of the Detroit office.

Parentheses are used in legal documents to surround figures in arabic numerals that follow the same amount in words:

> Remittance will be One Thousand Two Hundred Dollars ($1,200).

Be careful to put punctuation marks (period, comma, and so on) outside the parentheses unless they are part of the statement in parentheses. And keep in mind that parentheses have both an opening and a closing mark; both should always be used, even when setting off listed items within text: *(1)*, not *1)*.

Brackets are used for notation, comment, explanation, or correction within quoted material:

> In the interview, multimillionaire Bob Buford said, "One of my major influences was Peter [Drucker], who encourages people and helps them believe in themselves."

Brackets are also used for parenthetical material that falls within parentheses:

> Drucker's magnum opus (*Management: Tasks, Responsibilities, Practices* [Harper & Row, 1979]) has influenced generations of entrepreneurs.

## 2.12 ELLIPSES

Use ellipsis points, or three evenly spaced periods, to indicate that material has been left out of a direct quotation. Use them only in direct quotations and only at the point where material was left out. In the following example, the first sentence is quoted in the second:

> The Dow Jones Industrial Average fell 276.39 points, or 2.6%, during the week to 10292.31.

> According to the *Wall Street Journal*, "The Dow Jones Industrial Average fell 276.39 points . . . to 10,292.31."

The number of dots in ellipses is not optional; always use three. Occasionally, the points of an ellipsis come at the end of a sentence, where they seem to grow a fourth dot. Don't be fooled: One of the dots is a period. Ellipsis points should always be preceded and followed by a space.

Avoid using ellipses to represent a pause in your writing; use a dash for that purpose:

> At first we had planned to leave for the conference on Wednesday—but then we changed our minds. [not *on Wednesday . . . but then*]

### 2.12.1 Practice Session: Punctuation 2

Circle the letter of the preferred choice in each group of sentences.

1. **A.** Capital One uses data mining to predict what customers might buy, and how the company can sell those products to them.
   **B.** Capital One uses data mining to predict what customers might buy and how the company can sell those products to them.
2. **A.** During the three-year lawsuit, pressure built to settle out of court.
   **B.** During the three-year lawsuit pressure built to settle out of court.

3. **A.** The music store, which had been in the Harper family for three generations, was finally sold to a conglomerate.
   **B.** The music store which had been in the Harper family for three generations was finally sold to a conglomerate.
4. **A.** After the fire, Hanson resolved to build a bigger better bottling plant.
   **B.** After the fire, Hanson resolved to build a bigger, better bottling plant.
5. **A.** Wild Oats, a chain of natural food grocery stores, uses kiosks to deliver nutrition information to customers.
   **B.** Wild Oats; a chain of natural food grocery stores; uses kiosks to deliver nutrition information to customers.
6. **A.** Management consultant Peter Drucker said "The aim of marketing is to know the customer so well that the product or service sells itself.
   **B.** Management consultant Peter Drucker said, "The aim of marketing is to know the customer so well that the product or service sells itself."
7. **A.** Companies use a wide variety of techniques-contests, displays, and giveaways, to name a few-to sell you things.
   **B.** Companies use a wide variety of techniques—contests, displays, and giveaways, to name a few—to sell you things.
   **C.** Companies use a wide variety of techniques—contests, displays, and giveaways to name a few—to sell you things.
8. **A.** Self-insurance plans are not subject to state regulation or premium taxes.
   **B.** Self insurance plans are not subject to state regulation or premium taxes.
   **C.** Selfinsurance plans are not subject to state regulation or premium taxes.
9. **A.** Because ours is a non-profit corporation, we don't pay federal taxes.
   **B.** Because ours is a nonprofit corporation, we don't pay federal taxes.
10. **A.** The decision-making process depends on a buyer's culture, social class, and self-image.
    **B.** The decision-making process depends on a buyer's culture, social class, and self image.
    **C.** The decision making process depends on a buyer's culture, social class, and self-image.
11. **A.** Situation factors also play a role in consumer decision-making.
    **B.** Situation factors also play a role in consumer decision making.
12. **A.** Did you read the article "Citi Will Return $7 Billion to Investors"?
    **B.** Did you read the article "Citi Will Return $7 Billion to Investors?"
    **C.** Did you read the article "Citi Will Return $7 Billion to Investors?".
13. **A.** An insider at Arthur Andersen said that "the fall of the accounting giant stemmed from a series of poor management decisions made over decades."
    **B.** An insider at Arthur Andersen said that, "The fall of the accounting giant stemmed from a series of poor management decisions made over decades."
14. **A.** Have you read Jason Zein's article "Measuring the Internet?"
    **B.** Have you read Jason Zein's article "Measuring the Internet"?
15. **A.** According to Jamba Juice founder Kirk Peron, "jamba" is a West African word meaning *to celebrate*.
    **B.** According to Jamba Juice founder Kirk Peron, *jamba* is a West African word meaning "to celebrate."
    **C.** According to Jamba Juice founder Kirk Peron, "jamba" is a West African word meaning to celebrate.

# 3.0 Mechanics

The most obvious and least tolerable mistakes that a business writer makes are probably those related to grammar and punctuation. However, a number of small details, known as writing mechanics, demonstrate the writer's polish and reflect on the company's professionalism.

When it comes to mechanics, also called *style*, many of the "rules" are not hard and fast. Publications and organizations vary in their preferred styles for capitalization, abbreviations, numbers, italics, and so on. Here, we'll try to differentiate between practices that are generally accepted and those that can vary. When you are writing materials for a specific company or organization, find out the preferred style (such as *The Chicago Manual of Style* or *Webster's Style Manual*). Otherwise, choose a respected style guide. The key to style is consistency: If you spell out the word *percent* in one part of a document, don't use the percent sign in a similar context elsewhere in the same document.

## 3.1 CAPITALIZATION

With capitalization, you can follow either an "up" style (when in doubt, capitalize: *Federal Government, Board of Directors*) or a "down" style (when in doubt, use lowercase: *federal government, board of directors*). The trend over the last few decades has been toward the down style. Your best bet is to get a good style manual and consult it when you have a capitalization question. Following are some rules that most style guides agree on.

Capital letters are used at the beginning of certain word groups:

- Complete sentence: Before hanging up, he said, "We'll meet here on Wednesday at noon."
- Formal statement following a colon: She has a favorite motto: Where there's a will, there's a way.
- Phrase used as sentence: Absolutely not!
- Quoted sentence embedded in another sentence: Scott said, "Nobody was here during lunch hour except me."

- List of items set off from text:
  Three preliminary steps are involved:

  Design review
  Budgeting
  Scheduling

Capitalize proper adjectives and proper nouns (the names of particular persons, places, and things):

> Darrell Greene lived in a Victorian mansion.
>
> We sent Ms. Larson an application form, informing her that not all applicants are interviewed.
>
> Let's consider opening a branch in the West, perhaps at the west end of Tucson, Arizona.
>
> As office buildings go, the Kinney Building is a pleasant setting for TDG Office Equipment.
>
> We are going to have to cancel our plans for hiring French and German sales reps.

Larson's name is capitalized because she is a particular applicant, whereas the general term *applicant* is left uncapitalized. Likewise, *West* is capitalized when it refers to a particular place but not when it means a direction. In the same way, *office* and *building* are not capitalized when they are general terms (common nouns), but they are capitalized when they are part of the title of a particular office or building (proper nouns). Some proper adjectives are lowercased when they are part of terms that have come into common use, such as *french fries* and *roman numerals*.

Titles within families or companies as well as professional titles may also be capitalized:

> I turned down Uncle David when he offered me a job.
>
> I wouldn't be comfortable working for one of my relatives.
>
> We've never had a president quite like President Sweeney.

People's titles are capitalized when they are used in addressing a person, especially in a formal context. They are not usually capitalized, however, when they are used merely to identify the person:

> Address the letter to Chairperson Anna Palmer.
>
> I wish to thank Chairperson Anna Palmer for her assistance.
>
> Anna Palmer, chairperson of the board, took the podium.

Also capitalize titles if they are used by themselves in addressing a person:

> Thank you, Doctor, for your donation.

Always capitalize the first word of the salutation and complimentary close of a letter:

> *Dear* Mr. Andrews:     *Yours* very truly,

The names of organizations are capitalized, of course; so are the official names of their departments and divisions. However, do not use capitals when referring in general terms to a department or division, especially one in another organization:

> Route this memo to Personnel.
>
> Larry Tien was transferred to the Microchip Division.
>
> Will you be enrolled in the Psychology Department?
>
> Someone from the personnel department at EnerTech stopped by the booth.

Capitalization is unnecessary when using a word like *company, corporation*, or *university* alone:

> The corporation plans to issue 50,000 shares of common stock.

Likewise, the names of specific products are capitalized, although the names of general product types are not:

> Apple Inc.     Xerox machine
> Tide laundry detergent

When it comes to government terminology, here are some guides to capitalization: (1) Lowercase *federal* unless it is part of an agency name; (2) capitalize names of courts, departments, bureaus, offices, and agencies but lowercase such references as *the bureau* and *the department* when the full name is not used; (3) lowercase the titles of government officers unless they precede a specific person's name: *the secretary of state, the senator, the ambassador, the governor, and the mayor* but *Mayor Gonzalez* (Note: style guides vary on whether to capitalize *president* when referring to the president of the United States without including the person's name); (4) capitalize the names of laws and acts: *the Sherman Antitrust Act, the Civil Rights Act*; (5) capitalize the names of political parties but lowercase the word *party: Democratic party, Libertarian party*.

When writing about two or more geographic features of the same type, it is now accepted practice to capitalize the common noun in addition to the proper nouns, regardless of word order:

> Lakes Ontario and Huron
>
> Allegheny and Monongahela Rivers
>
> Corson and Ravenna Avenues

The names of languages, races, and ethnic groups are capitalized: Japanese, Caucasian, Hispanic. But racial terms that denote only skin color are not capitalized: black, white.

When referring to the titles of books, articles, magazines, newspapers, reports, movies, and so on, you should capitalize the first and last words and all nouns, pronouns, adjectives, verbs, and adverbs, and capitalize prepositions and conjunctions with five letters or more. Except for the first and last words, do not capitalize articles:

*Economics During the Great War*

"An Investigation into the Market for Long-Distance Services"

"What Successes Are Made Of"

When *the* is part of the official name of a newspaper or magazine, it should be treated this way too:

*The Wall Street Journal*

Style guides vary in their recommendations regarding capitalization of hyphenated words in titles. A general guide is to capitalize the second word in a temporary compound (a compound that is hyphenated for grammatical reasons and not spelling reasons), such as *Law-Abiding Citizen*, but to lowercase the word if the term is always hyphenated, such as *Son-in-law*).

References to specific pages, paragraphs, lines, and the like are not capitalized: *page 73, line 3*. However, in most other numbered or lettered references, the identifying term is capitalized:

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Finally, the names of academic degrees are capitalized when they follow a person's name but are not capitalized when used in a general sense:

I received a bachelor of science degree.

Thomas Whitelaw, Doctor of Philosophy, will attend.

Similarly, general courses of study are not capitalized, but the names of specific classes are:

She studied accounting as an undergraduate.

She is enrolled in Accounting 201.

## 3.2 UNDERSCORES AND ITALICS

Usually a line typed underneath a word or phrase either provides emphasis or indicates the title of a book, magazine, or newspaper. If possible, use italics instead of an underscore. Italics (or underlining) should also be used for defining terms and for discussing words as words:

In this report, *net sales* refers to after-tax sales dollars.

Also use italics to set off foreign words, unless the words have become a common part of English:

Top Shelf is considered the *sine qua non* of comic book publishers.

Chris uses a laissez-faire [no italic] management style.

## 3.3 ABBREVIATIONS

Abbreviations are used heavily in tables, charts, lists, and forms. They're used sparingly in prose. Here are some abbreviation situations to watch for:

- In most cases do not use periods with acronyms (words formed from the initial letter or letters of parts of a term): *CEO, CD-ROM, DOS, YWCA, FDA;* but *Ph.D., M.A., M. D.*
- Use periods with abbreviations such as *Mr., Ms., Sr., Jr., a.m., p.m., B.C.*, and *A.D.*
- The trend is away from using periods with such units of measure as *mph, mm*, and *lb*.
- Use periods with such Latin abbreviations as *e.g., i.e., et al.*, and *etc*. However, style guides recommend that you avoid using these Latin forms and instead use their English equivalents *(for example, that is, and others*, and *and so on*, respectively). If you must use these abbreviations, such as in parenthetical expressions or footnotes, do not put them in italics.
- Some companies have abbreviations as part of their names *(&, Co., Inc., Ltd.)*. When you refer to such firms by name, be sure to double-check the preferred spelling, including spacing: *AT&T; Barnes & Noble; Carson Pirie Scott & Company; PepsiCo; Kate Spade, Inc.; National Data Corporation; Siemens Corp.; Glaxo Wellcome PLC; US Airways; U.S. Business Reporter*.
- Most style guides recommend that you spell out *United States* as a noun and reserve *U.S.* as an adjective preceding the noun modified.

One way to handle an abbreviation that you want to use throughout a document is to spell it out the first time you use it, follow it with the abbreviation in parentheses, and then use the abbreviation in the remainder of the document.

## 3.4 NUMBERS

Numbers may be correctly handled many ways in business writing, so follow company style. In the absence of a set style, however, generally spell out all numbers from one to nine and use arabic numerals for the rest.

There are some exceptions to this general rule. For example, never begin a sentence with a numeral:

Twenty of us produced 641 units per week in the first 12 weeks of the year.

Use numerals for the numbers one through nine if they're in the same list as larger numbers:

Our weekly quota rose from 9 to 15 to 27.

Use numerals for percentages, time of day (except with o'clock), dates, and (in general) dollar amounts:

Our division is responsible for 7 percent of total sales.

The meeting is scheduled for 8:30 a.m. on August 2.

Add $3 for postage and handling.

When using numerals for time, be consistent: It should be *between 10:00 a.m. and 4:30 p.m.*, not *between 10 a.m. and 4:30 p.m*. Expressions such as *4:00 o'clock* and *7 a.m. in the morning* are redundant.

Use a comma in numbers expressing thousands (1,257), unless your company specifies another style. When dealing with numbers in the millions and billions, combine words and figures: 7.3 million, 2 billion.

When writing dollar amounts, use a decimal point only if cents are included. In lists of two or more dollar amounts, use the decimal point either for all or for none:

> He sent two checks, one for $67.92 and one for $90.00.

When two numbers fall next to each other in a sentence, use figures for the number that is largest, most difficult to spell, or part of a physical measurement; use words for the other:

> I have learned to manage a classroom of 30 twelve-year-olds.
>
> She won a bonus for selling 24 thirty-volume sets.
>
> You'll need twenty 3-inch bolts.

In addresses, all street numbers except One are in numerals. So are suite and room numbers and zip codes. For street names that are numbered, practice varies so widely that you should use the form specified on an organization's letterhead or in a reliable directory. All the following examples are correct:

| | |
|---|---|
| One Fifth Avenue | 297 Ninth Street |
| 1839 44th Street | 11026 West 78 Place |

Telephone numbers are always expressed in numerals. Parentheses may separate the area code from the rest of the number, but a slash or a hyphen may be used instead, especially if the entire phone number is enclosed in parentheses:

> 382-8329 (602/382-8329) 602-382-8329

Percentages are always expressed in numerals. The word *percent* is used in most cases, but % may be used in tables, forms, and statistical writing.

Ages are usually expressed in words—except when a parenthetical reference to age follows someone's name:

> Mrs. Margaret Sanderson is seventy-two.
>
> Mrs. Margaret Sanderson, 72, swims daily.

Also, ages expressed in years and months are treated like physical measurements that combine two units of measure: *5 years, 6 months*.

Physical measurements such as distance, weight, and volume are also often expressed in numerals: *9 kilometers, 5 feet 3 inches, 7 pounds 10 ounces*.

Decimal numbers are always written in numerals. In most cases, add a zero to the left of the decimal point if the number is less than one and does not already start with a zero:

> 1.38 .07 0.2

In a series of related decimal numbers with at least one number greater than one, make sure that all numbers smaller than one have a zero to the left of the decimal point: 1.20, 0.21, 0.09.

Simple fractions are written in words, but more complicated fractions are expressed in figures or, if easier to read, in figures and words:

> two-thirds 9/32 2 hundredths

When typing ordinal numbers, such as *3rd edition* or *21st century*, your word processing program may automatically make the letters *rd* (or *st, th*, or *nd*) into a superscript. Do yourself a favor and turn that formatting function off in your "Preferences," as superscripts should not be used in regular prose or even in bibliographies.

## 3.5 WORD DIVISION

In general, avoid dividing words at the end of lines. When you must do so, follow these rules:

- Don't divide one-syllable words (such as *since, walked*, and *thought*), abbreviations (*mgr.*), contractions (*isn't*), or numbers expressed in numerals (*117,500*).
- Divide words between syllables, as specified in a dictionary or word-division manual.
- Make sure that at least three letters of the divided words are moved to the second line: *sin-cerely* instead of *sincere-ly*.
- Do not end a page or more than three consecutive lines with hyphens.
- Leave syllables consisting of a single vowel at the end of the first line (*impedi-ment* instead of *imped-iment*), except when the single vowel is part of a suffix such as *-able, -ible, -ical*, or *-ity (re-spons-ible* instead of *re-sponsi-ble)*.
- Divide between double letters (*tomor-row*), except when the root word ends in double letters (*call-ing* instead of *cal-ling*).
- Wherever possible, divide hyphenated words at the hyphen only: instead of *anti-inde-pendence*, use *anti-independence*.
- Whenever possible, do not break URLs or email addresses. If you have to break a long URL or email address, do not insert a hyphen at the end of the first line.

### Practice Session: Mechanics

Circle the letter of the preferred choice in each of the following groups of sentences.

**1. A.** When you are in New York City for the sales meeting, be sure to visit the art deco Chrysler Building.
**B.** When you are in New York city for the sales meeting, be sure to visit the Art Deco Chrysler building.
**C.** When you are in New York City for the sales meeting, be sure to visit the Art Deco Chrysler Building.

2. **A.** We plan to expand our national operations to the west as well as the south.
   **B.** We plan to expand our national operations to the West as well as the South.
   **C.** We plan to expand our national operations to the west as well as the South.
3. **A.** Lee Marrs, who is President of Lee Marrs Designs, has been chosen to revamp our website.
   **B.** Lee Marrs, who is president of Lee Marrs Designs, has been chosen to revamp our website.
   **C.** Lee Marrs, who is President of Lee Marrs Designs, has been chosen to revamp our Website.
4. **A.** There's one thing we know for sure: Having a good idea doesn't guarantee success.
   **B.** There's one thing we know for sure: having a good idea doesn't guarantee success.
5. **A.** Be sure to order manila envelopes in all sizes: 9", 12", 11", 14", etc.
   **B.** Be sure to order manila envelopes in all sizes: 9", 12", 11", 14" and etc.
6. **A.** The traditional trading period for U.S. stock exchanges is 9:30 a.m. to 4 o'clock p.m.
   **B.** The traditional trading period for U.S. stock exchanges is 9:30 a.m. to 4 p.m.
   **C.** The traditional trading period for U.S. stock exchanges is 9:30 a.m to 4:00 p.m.
7. **A.** The number of members on the board of directors has been reduced from 13 to nine.
   **B.** The number of members on the board of directors has been reduced from 13 to 9.
8. **A.** The CDs are priced at $15, $12.95, and $11.00.
   **B.** The CDs are priced at $15.00, $12.95, and $11.00.
   **C.** The CDs are priced at $15, $12.95, and $11.
9. **A.** Twenty people have signed up for the spreadsheet software class, but there is room for 25.
   **B.** 20 people have signed up for the spreadsheet software class, but there is room for 25.
10. **A.** The best way to divide the word *sincerely* is "sin-cerely."
    **B.** The best way to divide the word *sincerely* is "sincere-ly."

# 4.0 Vocabulary

Using the right word in the right place is a crucial skill in business communication. However, many pitfalls await the unwary.

## 4.1 FREQUENTLY CONFUSED WORDS

Because the following sets of words sound similar, be careful not to use one when you mean to use the other:

| Word | Meaning |
|---|---|
| accede | to comply with |
| exceed | to go beyond |
| accept | to take |
| except | to exclude |
| access | admittance |
| excess | too much |
| advice | suggestion |
| advise | to suggest |
| affect | to influence |
| effect | the result |
| allot | to distribute |
| a lot | much or many |
| all ready | completely prepared |
| already | completed earlier |
| born | given birth to |
| borne | carried |
| capital | money; chief city |
| capitol | a government building |
| cite | to quote |
| sight | a view |
| site | a location |
| complement | complete amount; to go well with |
| compliment | expression of esteem; to flatter |
| corespondent | party in a divorce suit |
| correspondent | letter writer |
| council | a panel of people |
| counsel | advice; a lawyer |
| defer | to put off until later |
| differ | to be different |
| device | a mechanism |
| devise | to plan |
| die | to stop living; a tool |
| dye | to color |
| discreet | careful |
| discrete | separate |
| envelop | to surround |
| envelope | a covering for a letter |
| forth | forward |
| fourth | number four |
| holey | full of holes |
| holy | sacred |
| wholly | completely |
| human | of people |
| humane | kindly |
| incidence | frequency |
| incidents | events |

| Word | Meaning |
|---|---|
| instance | example |
| instants | moments |
| interstate | between states |
| intrastate | within a state |
| its | indicates possession |
| it's | contracted form of it is |
| later | afterward |
| latter | the second of two |
| lead | a metal; to guide |
| led | guided |
| lean | to rest at an angle |
| lien | a claim |
| levee | embankment |
| levy | tax |
| loath | reluctant |
| loathe | to hate |
| loose | free; not tight |
| lose | to mislay |
| material | substance |
| materiel | equipment |
| miner | mineworker |
| minor | underage person |
| moral | virtuous; a lesson |
| morale | sense of well-being |
| ordinance | law |
| ordnance | weapons |
| overdo | to do in excess |
| overdue | past due |
| peace | lack of conflict |
| piece | a fragment |
| pedal | a foot lever |
| peddle | to sell |
| persecute | to torment |
| prosecute | to sue |
| personal | private |
| personnel | employees |
| precedence | priority |
| precedents | previous events |
| principal | sum of money; chief; main |
| principle | general rule |
| rap | to knock |
| wrap | to cover |
| residence | home |
| residents | inhabitants |

| Word | Meaning |
|---|---|
| right | correct |
| rite | ceremony |
| write | to form words on a surface |
| role | a part to play |
| roll | to tumble; a list |
| root | part of a plant |
| rout | to defeat |
| route | a traveler's way |
| shear | to cut |
| sheer | thin, steep |
| stationary | immovable |
| stationery | paper |
| than | as compared with |
| then | at that time |
| their | belonging to them |
| there | in that place |
| they're | they are |
| to | a preposition |
| too | excessively; also |
| two | the number |
| waive | to set aside |
| wave | a swell of water; a gesture |
| weather | atmospheric conditions |
| whether | if |
| who's | contraction of "who is" or "who has" |
| whose | possessive form of who |

In the preceding list, only enough of each word's meaning is given to help you distinguish between the words in each group. Several meanings are left out entirely. For more complete definitions, consult a dictionary.

### Practice Session: Confused Words

In the following sentences, underline the preferred choice within each set of parentheses.

1. If our bid is (*accepted, excepted*), we will begin the project in November.
2. This website offers some great (*advice, advise*) on setting up a new business.
3. How will the accounting scandal (*affect, effect*) Arthur Andersen's future?
4. Most of the costs of the project will be (*born, borne*) by the contractor.
5. In preparing the budget, we have to decide where best to invest our (*capital, capitol*).
6. Be sure to (*cite, site*) the sources for your data when you prepare your report.
7. The acquisition of LPC Group should (*compliment/ complement*) our other holdings.

8. Leo sought the (*council, counsel*) of his attorney before signing the contract.
9. I didn't have to be told to be (*discrete, discreet*) about the sexual harassment case.
10. When Jennings Hardware got behind in its debts, one of the creditors placed a (*lean, lien*) on its building.
11. Mr. Hathaway was (*loath, loathe*) to fire Elizabeth, but he had no choice.
12. To comply with local zoning (*ordinances, ordnances*), we had to replace our sign.
13. As a teenager, Gary Sassaman used to (*pedal, peddle*) newspapers in downtown Pittsburgh.
14. Business owners along El Cajon Boulevard have vowed to (*persecute, prosecute*) anyone caught painting graffiti on their buildings.
15. We don't know of any (*precedence, precedents*) for the exponential growth of sales for this kind of product.
16. The (*principle, principal*) reason for closing down operations was obsolete production equipment that was too expensive to replace.
17. It's hard to say what (*role, roll*) the downturn in the economy played in the failure of Seven Hills Distribution.
18. Sunbeam employees were shocked by new CEO Al Dunlap's (*shear, sheer*) ruthlessness in axing jobs and slashing costs.
19. Now that our area code has changed, we will need to order new (*stationary, stationery*).
20. The Rodriguez brothers couldn't decide (*weather, whether*) to form a partnership or establish a corporation.

## 4.2 FREQUENTLY MISUSED WORDS

The following words tend to be misused for reasons other than their sound. Reference books (including the *Random House College Dictionary*, revised edition; Follett's *Modern American Usage*; and Fowler's *Modern English Usage*) can help you with similar questions of usage:

**a lot:** When the writer means "many," *a lot* is always two separate words, never one.

**aggravate/irritate:** *Aggravate* means "to make things worse." Sitting in the smoke-filled room *aggravated* his sinus condition. *Irritate* means "to annoy." Her constant questions *irritated* [not *aggravated*] me.

**anticipate/expect:** *Anticipate* means "to prepare for": Macy's *anticipated* increased demand for athletic shoes in spring by ordering in November. In formal usage, it is incorrect to use *anticipate* for *expect*: I *expected* (not *anticipated*) a better response to our presentation than we actually got.

**compose/comprise:** The whole comprises the parts:

The company's distribution division *comprises* four departments.

The following usage is incorrect:

The company's distribution division *is comprised of* four departments.

In that construction, *is composed of* or *consists of* would be preferable. It might be helpful to think of *comprise* as meaning "encompasses" or "contains."

**continual/continuous:** *Continual* refers to ongoing actions that have breaks:

Her *continual* complaining will accomplish little in the long run.

*Continuous* refers to ongoing actions without interruptions or breaks:

A *continuous* stream of paper came out of the fax machine.

**convince/persuade:** One is *convinced* of a fact or that something is true; one is *persuaded* by someone else to do something. The use of *to* with *convince* is unidiomatic—you don't convince someone to do something, you persuade them to do it.

**correspond with:** Use this phrase when you are talking about exchanging letters. Use *correspond to* when you mean "similar to." Use either *correspond with* or *correspond to* when you mean "relate to."

**dilemma/problem:** Technically, a *dilemma* is a situation in which one must choose between two undesirable alternatives. It shouldn't be used when no choice is actually involved.

**disinterested:** This word means "fair, unbiased, having no favorites, impartial." If you mean "bored" or "not interested," use *uninterested*.

**etc.:** This abbreviated form of the Latin phrase *et cetera* means "and so on" or "and so forth," so it is never correct to write *and etc*. The current tendency among business writers is to use English rather than Latin.

**flaunt/flout:** To *flaunt* is to be ostentatious or boastful; to *flout* is to mock or scoff at.

**impact:** Avoid using *impact* as a verb when *influence* or *affect* is meant.

**imply/infer:** Both refer to hints. Their great difference lies in who is acting. The writer *implies*, the reader *infers*, sees between the lines.

**its/their:** Use *its* to indicate possession by a singular entity such as a company, not *their*. "HP released its quarterly results" is correct; "HP released their quarterly results" is not.

**lay:** This word is a transitive verb. Never use it for the intransitive *lie*. (See Section 1.3.3.)

**lend/loan:** *Lend* is a verb; *loan* is a noun. Usage such as "Can you loan me $5?" is therefore incorrect.

**less/fewer:** Use *less* for uncountable quantities (such as amounts of water, air, sugar, and oil). Use *fewer* for countable quantities (such as numbers of jars, saws, words, page, and humans). The same distinction applies to *much* and *little* (uncountable) versus *many* and *few* (countable).

**liable/likely:** *Liable* means "responsible for": I will hold you *liable* if this deal doesn't go through. It is incorrect to use *liable* for "possible": Anything is *likely* (not *liable*) to happen.

**literally:** *Literally* means "actually" or "precisely"; it is often misused to mean "almost" or "virtually." It is usually best left out entirely or replaced with *figuratively*.

**many/much:** See *less/fewer*.

**regardless:** The *less* suffix is the negative part. No word needs two negative parts, so don't add *ir* (a negative prefix) to the beginning. There is no such word as *irregardless*.

**try:** Always follow with *to*, never *and*.

**verbal:** People in the business community who are careful with language frown on those who use *verbal* to mean "spoken" or "*oral*." Many others do say "verbal agreement." Strictly speaking, *verbal* means "of words" and therefore includes both spoken and written words. Follow company usage in this matter.

### Practice Session: Misused Words

In the following sentences, underline the preferred choice within each set of parentheses.

1. My boss told me that I still have (*a lot, alot*) to learn.
2. The U.S. Congress corresponds (*to, with*) the British Parliament.
3. I tried to convince my co-workers to sign up for the stress reduction program, but they all seemed (*uninterested, disinterested*).
4. When you say that the books have some discrepancies, are you (*inferring, implying*) that our accountant is embezzling from us?
5. From the auditor's silent stare, Margaret (*implied, inferred*) that the man was not amused by her jokes.
6. The report came out to (*less, fewer*) pages than we had originally anticipated.
7. Mr. Martens was treating Heather (*like, as if*) she had done something wrong.
8. You have to finish the job, (*irregardless, regardless*) of your loathing for it.
9. When talking to customers on the phone, try (*and, to*) be as pleasant as possible.
10. When making (*an oral, a verbal*) presentation, it's a good idea to make eye contact with your audience.

## 4.3 FREQUENTLY MISSPELLED WORDS

All of us, even the world's best spellers, sometimes have to check a dictionary for the spelling of some words. People who have never memorized the spelling of commonly used words must look up so many that they grow exasperated and give up on spelling words correctly.

Don't expect perfection and don't surrender. If you can memorize the spelling of just the words listed here, you'll need the dictionary far less often and you'll write with more confidence:

absence
absorption
accessible
accommodate
accumulate
achieve
advantageous
affiliated
aggressive
alignment
aluminum
ambience
analyze
apparent
appropriate
argument
asphalt
assistant
asterisk
auditor

bankruptcy
believable
brilliant
bulletin

calendar
campaign
category
ceiling
changeable
clientele
collateral
committee
comparative
competitor
concede
congratulations
connoisseur
consensus
convenient
convertible
corroborate
criticism

definitely
description
desirable
dilemma
disappear
disappoint
disbursement
discrepancy
dissatisfied
dissipate

eligible
embarrassing
endorsement
exaggerate
exceed
exhaust
existence
extraordinary

fallacy
familiar
flexible
fluctuation
forty

gesture
grievous

haphazard
harassment
holiday

illegible
immigrant
incidentally
indelible
independent
indispensable
insistent
intermediary
irresistible

jewelry
judgment
judicial

labeling
legitimate
leisure
license
litigation

maintenance
mathematics
mediocre
minimum

necessary
negligence
negotiable
newsstand
noticeable

occurrence
omission

parallel
pastime
peaceable
permanent
perseverance
persistent
personnel
persuade
possesses
precede
predictable
preferred
privilege
procedure
proceed

pronunciation
psychology
pursue

questionnaire

receive
recommend
repetition
rescind
rhythmical
ridiculous

salable
secretary
seize
separate
sincerely
succeed
suddenness
superintendent
supersede
surprise

tangible
tariff
technique
tenant
truly

unanimous
until

vacillate
vacuum
vicious

### Practice Session: Misspelled Words

In the following sentences, underline the preferred choice within each set of parentheses.

1. We try to (*accomodate, accommodate*) any reasonable request from our customers.
2. You will need to (*analyse, analyze*) the sales data to determine which products to phase out.
3. Because the weather in Chicago is so (*changable, changeable*), the conference reception has a backup indoor venue.
4. The board reached a (*concensus, consensus*) on the new CEO.
5. It will be (*embarassing, embarrassing*) for the company if this information leaks out.
6. The auditors discovered the (*existance, existence*) of hidden accounts in foreign banks.
7. Every company should have a written sexual (*harassment, harrassment*) policy.
8. In today's book business, (*independant, independent*) publishers are having a tough time finding distribution.
9. Use your best (*judgment, judgement*) when choosing the paper for our new stationery.
10. The cost of a business (*licence, license, liscence*) varies from city to city.
11. With all the turmoil (*occuring, occurring*) in the stock market, we've decided to shift our investments toward real estate.
12. The marketing survey found that consumers (*prefered, preferred*) brand-name dog food over generic brands.
13. Because her cost-cutting measures saved the company millions of dollars, Carolyn Kelly (*received, recieved*) a raise and a promotion.
14. Please send (*separate, seperate*) invoices for the two projects.
15. My supervisor didn't need to be so (*vicious, viscious*) in his critique of my performance.

## 4.4 TRANSITIONAL WORDS AND PHRASES

The following sentences don't communicate as well as they could because they lack a transitional word or phrase:

> Production delays are inevitable. Our current lag time in filling orders is one month.

A semicolon between the two sentences would signal a close relationship between their meanings, but it wouldn't even hint at what that relationship is. Here are the sentences again, now linked by means of a semicolon, with a space for a transitional word or phrase:

> Production delays are inevitable; _________, our current lag time in filling orders is one month.

Now read the sentence with *nevertheless* in the blank space. Then try *therefore, incidentally, in fact*, and *at any rate* in the blank. Each substitution changes the meaning of the sentence.

Here are some transitional words (conjunctive adverbs) that will help you write more clearly:

accordingly
anyway
consequently
finally
furthermore

however
incidentally
likewise
meanwhile

moreover
otherwise
still
therefore

The following transitional phrases are used in the same way:

| | |
|---|---|
| as a result | in other words |
| for example | in the second place |
| in fact | on the other hand |
| | to the contrary |

When one of these words or phrases joins two independent clauses, it should be preceded by a semicolon and followed by a comma:

> The consultant recommended a complete reorganization; moreover, she suggested that we drop several products.

## Practice Session Answers

**Answers for Nouns:** 1. City 2. Building / building 3. hotels 4. *t*'s / *i*'s 5. 1990s 6. shelves 7. specialties 8. cases 9. company's 10. editor-in-chief's 11. businesses' 12. passengers' 13. day's 14. Dallas's 15. Jones's

**Answers for Pronouns:** 1. me 2. she 3. him 4. We 5. me 6. its 7. his or her 8. Who 9. whom 10. Whom 11. her 12. him or her 13. her 14. its 15. Who 16. your 17. its 18. I 19. their 20. its

**Answers for Verbs:** 1. comes, want 2. knew 3. begun 4. lie 5. laid 6. sits 7. set 8. raise 9. was 10. is 11. is 12. are 13. is 14. is 15. represents 16. is 17. are 18. is 19. send 20. were

**Answers for Adjectives and Adverbs:** 1. least 2. better 3. worse 4. more competent 5. unique 6. well-written 7. well written 8. beautifully written 9. lower-income 10. well 11. well 12. really 13. slowly 14. could hardly 15. more heavily

**Answers for Prepositions, Conjunctions, Articles, and Interjections:** 1. a 2. b 3. a 4. b 5. b 6. a 7. b 8. a 9. b 10. a 11. b 12. b 13. a 14. a 15. a

**Answers for Sentences:** 1. a 2. b 3. b 4. c 5. c 6. b 7. c 8. c 9. a 10. c

**Answers for Punctuation 1:** 1. b 2. a 3. b 4. b 5. a 6. b 7. a 8. a 9. b 10. c

**Answers for Punctuation 2:** 1. b 2. a 3. a 4. b 5. a 6. b 7. b 8. a 9. b 10. a 11. b 12. a 13. a 14. b 15. b

**Answers for Mechanics:** 1. c 2. b 3. b 4. a 5. a 6. c 7. b 8. b 9. a 10. a

**Answers for Confused Words:** 1. accepted 2. advice 3. affect 4. borne 5. capital 6. cite 7. complement 8. counsel 9. discreet 10. lien 11. loath 12. ordinances 13. peddle 14. prosecute 15. precedents 16. principal 17. role 18. sheer 19. stationery 20. whether

**Answers for Misused Words:** 1. a lot 2. to 3. uninterested 4. implying 5. inferred 6. fewer 7. as if 8. regardless 9. to 10. an oral

**Answers for Misspelled Words:** 1. accommodate 2. analyze 3. changeable 4. consensus 5. embarrassing 6. existence 7. harassment 8. independent 9. judgment 10. license 11. occurring 12. preferred 13. received 14. separate 15. vicious

# Answer Keys

## ANSWER KEY TO THE LEVEL 1 SELF-ASSESSMENT EXERCISES

### CHAPTER 1: SELF-ASSESSMENT—NOUNS

*For the following items, common nouns are underlined, and proper nouns are boxed.*

**1-28.** Give the balance sheet to Melissa. (1.1.1)

**1-29.** After three years of declining sales, the board fired the CEO and hired a replacement from Google. (1.1.1)

**1-30.** Tarnower Corporation donates a portion of its profits to charity every year. (1.1.1)

**1-31.** Which aluminum bolts are packaged? (1.1.1)

**1-32.** Please send the Joneses a dozen of the following: stopwatches, canteens, headbands, and wristbands. (1.1.1)

*For the following items, subjects are underlined, and objects are boxed.*

**1-33.** The technician has already repaired the machine for the client. (1.1.2)

**1-34.** An attorney will talk to the group about incorporation. (1.1.2)

**1-35.** After her vacation, the buyer prepared a third-quarter budget. (1.1.2)

**1-36.** More than 90 percent of the research staff has contributed to the new wiki. (1.1.2)

**1-37.** Accuracy overrides speed in importance. (1.1.2)

*For the following items, incorrect plurals and possessives are underlined, and the correct forms are shown in bold.*

**1-38.** Make sure that all copys **copies** include the new addresses. (1.1.2)

**1-39.** Ask Jennings to collect all employee's **employees'** donations for the Red Cross drive. (1.1.4)

**1-40.** Charlie now has two son-in-laws **sons-in-law** to help him with his two online business's **businesses**. (1.1.3, 1.1.4)

**1-41.** Avoid using too many parenthesises **parentheses** when writing your reports. (1.1.3)

**1-42.** Follow President Nesses **Ness's** rules about what constitutes a weeks **week's** work. (1.1.4)

### CHAPTER 2: SELF-ASSESSMENT—PRONOUNS

*For the following items, the correct pronouns are shown in bold.*

**2-22.** To **whom** will you send your merchandise? (1.2)

**2-23.** Have you given **them** a list of parts? (1.2)

**2-24.** The main office sent the invoice to **them** on December 5. (1.2)

**2-25.** The company settled **its** accounts before the end of the year. (1.2)

**2-26.** **Whose** umbrella is this? (1.2)

*For the following items, the correct pronouns are boxed.*

**2-27.** The sales staff is preparing guidelines for (*their, its*) clients. (1.2.5)

**2-28.** Few of the sales representatives turn in (*their, its*) reports on time. (1.2.5)

**2-29.** The board of directors has chosen (*their, its*) officers. (1.2.5)

**2-30.** Gomez and Archer have told (*his, their*) clients about the new program. (1.2.1)

**2-31.** Each manager plans to expand (*his, their, his or her*) sphere of control next year. (1.2.3)

**2-32.** Has everyone supplied (*his, their, his or her*) Social Security number? (1.2.3)

**2-33.** After giving every employee (*his, their, a*) raise, George told (*them, they, all*) about the increased workload. (1.2.3, 1.2.4)

**2-34.** Bob and Tim have opposite ideas about how to achieve company goals. (*Who, Whom*) do you think will win the debate? (1.2.4)

**2-35.** City Securities has just announced (*who, whom*) it will hire as CEO. (1.2.4)

**2-36.** Either of the new products would readily find (*their, its*) niche in the marketplace. (1.2.5)

### CHAPTER 3: SELF-ASSESSMENT—VERBS

**3-51.** have become (1.3.1)

**3-52.** knew (1.3.1)

**3-53.** has moved (1.3.1)

**3-54.** will do (1.3.1)

**3-55.** will have returned (1.3.1)

**3-56.** Leslie Cartwright will write the report. (1.3.5)

**3-57.** I failed to record the transaction. (1.3.5)

**3-58.** Has the claims department notified you of your rights? (1.3.5)

**3-59.** We depend on their services for our operation. (1.3.5)

**3-60.** The customer returned the damaged equipment before we even located a repair facility. (1.3.5)

**3-61.** Everyone upstairs (*receive/receives*) mail before we do. (1.3.4)

**3-62.** Neither the main office nor the branches (*is/are*) blameless. (1.3.4)

**3-63.** C&B Sales (*is/are*) listed in the directory. (1.3.4)

**3-64.** When measuring shelves, 7 inches (*is/are*) significant. (1.3.4)

**3-65.** About 90 percent of the employees (plan /plans) to come to the company picnic. (1.3.4)

### CHAPTER 4: SELF-ASSESSMENT—ADJECTIVES

**4-58.** greater (1.4.1)

**4-59.** perfect (1.4.1)

**4-60.** most interesting (1.4.1)

**4-61.** better (1.4.1)

**4-62.** hardest (1.4.1)

**4-63.** A highly placed source revealed Dotson's last-ditch efforts to cover up the mistake. (1.4.2)

**4-64.** Please send an extra-large dust cover for my photocopier. (1.4.2)

**4-65.** A top-secret document was taken from the president's office last night. (1.4.2)

**4-66.** A 30-year-old person should know better. (1.4.2)

**4-67.** If I write a large-scale report, I want to know that it will be read by upper-level management. (1.4.2)

**4-68.** The two companies are engaged in an all-out, no-holds-barred struggle for dominance. (1.4)

**4-69.** A tiny metal shaving is responsible for the problem. (1.4)

**4-70.** She came to the office with a bruised, swollen knee. (1.4)

**4-71.** A chipped, cracked sheet of glass is useless to us. (1.4)

**4-72.** You'll receive our usual cheerful, prompt service. (1.4)

## CHAPTER 5: SELF-ASSESSMENT—ADVERBS

**5-69.** good (1.5)
**5-70.** surely (1.5)
**5-71.** sick (1.5)
**5-72.** beautiful (1.5)
**5-73.** good (1.5)
**5-74.** faster (1.5.2)
**5-75.** most recently (1.5.2)
**5-76.** more happily (1.5.2)
**5-77.** better (1.5.2)
**5-78.** most logically (1.5.2)
**5-79.** He doesn't seem to have any. *OR* He seems to have none. (1.5.1)
**5-80.** That machine is scarcely ever used. *OR* That machine is never used. (1.5.1)
**5-81.** They can't get any replacement parts until Thursday. *OR* They can get no replacement parts until Thursday. (1.5.1)
**5-82.** It wasn't any different from the first event we promoted. *OR* It was no different from the first event we promoted. (1.5.1)
**5-83.** We've looked for it, and it doesn't seem to be anywhere. *OR* It seems to be nowhere. (1.5.1)

## CHAPTER 6: SELF-ASSESSMENT—PREPOSITIONS AND CONJUNCTIONS

**6-38.** Where was your argument leading ~~to~~? (1.6.1)
**6-39.** I wish he would get off ~~of~~ the phone. (1.6.1)
**6-40.** This is a project ~~into which~~ you can sink your teeth into. (1.6.1)
**6-41.** U.S. Mercantile must become aware of and sensitive to its customers' concerns. (1.6.1)
**6-42.** We are responsible for aircraft safety in the air, in the hangars, and on the runways. (1.6.1)
**6-43.** to (1.6.1)
**6-44.** among (1.6.1)
**6-45.** for (1.6.1)
**6-46.** to (1.6.1)
**6-47.** from (1.6.1)
**6-48.** She is active ~~in~~ not only in a civic group but also in an athletic organization. *OR* She is active in not only a civic group but ~~in~~ also an athletic organization. (1.6.2)
**6-49.** That is either a mistake or ~~was~~ an intentional omission. (1.6.2)
**6-50.** The question is whether to set up a booth at the convention or ~~be~~ to host a hospitality suite. (1.6.2)
**6-51.** We are doing better ~~in~~ both in overall sales and in profits. *OR* in both overall sales and ~~in~~ profits. (1.6.2)
**6-52.** She had neither the preferred educational background, nor ~~did she have~~ the suitable experience. (1.6.2)

## CHAPTER 7: SELF-ASSESSMENT—PERIODS, QUESTION MARKS, AND EXCLAMATION POINTS

**7-44.** Dr. Eleanor H. Hutton has requested information on TaskMasters, Inc. (2.1)
**7-45.** That qualifies us as a rapidly growing new company, don't you think? (2.2)
**7-46.** Our president, Daniel Gruber, is a CPA. On your behalf, I asked him why he started the company. (2.1)
**7-47.** In the past three years, we have experienced phenomenal growth of 800 percent. *OR* ! (2.1, 2.3)
**7-48.** Contact me at 1358 N. Parsons Avenue, Tulsa, OK 74204. (2.1)
**7-49.** Jack asked, "Why does he want to know? Maybe he plans to become a competitor." *OR* ! (2.1, 2.2, 2.3)
**7-50.** The debt load fluctuates with the movement of the U.S. prime rate. (2.1)
**7-51.** I can't believe we could have missed such a promising opportunity! (2.3)
**7-52.** Is consumer loyalty extinct? Yes and No. (2.2, 2.1)
**7-53.** Johnson and Kane, Inc., has gone out of business. What a surprise. *OR* ! (2.1, 2.3)
**7-54.** Will you please send us a check today so that we can settle your account. (2.1)
**7-55.** Mr. James R. Capp will be our new CEO, beginning January 20, 2014. (2.1)
**7-56.** The rag doll originally sold for $1,098, but we have lowered the price to a mere $599. (2.1)
**7-57.** Will you be able to make the presentation at the conference, or should we find someone else? (2.2)
**7-58.** So I ask you, "When will we admit defeat?" Never! (2.2, 2.3)

## CHAPTER 8: SELF-ASSESSMENT—SEMICOLONS, COLONS, AND COMMAS

**8-40.** This letter looks good; that one doesn't. (2.4)
**8-41.** I want to make one thing perfectly clear: neither of you will be promoted if sales figures don't improve. (2.5)
**8-42.** The Zurich airport has been snowed in; therefore, I won't be able to meet with you before January 4. (2.4)
**8-43.** His motivation was obvious: to get Meg fired. (2.5)
**8-44.** Only two firms have responded to our survey: J. J. Perkins and Tucker & Tucker. (2.5)
**8-45.** Send a copy to Mary Kent, Marketing Director; Robert Bache, Comptroller; and Dennis Mann, Sales Director. (2.4)
**8-46.** Please be sure to interview these employees next week: Henry Gold, Doris Hatch, and George Iosupovich. (2.5)
**8-47.** We have observed your hard work; because of it, we are promoting you to manager of your department. (2.4)
**8-48.** You shipped three items on June 7; however, we received only one of them. (2.4)
**8-49.** The convention kit includes the following response cards: giveaways, brochures, and a display rack. (2.5)
**8-50.** The workers wanted an immediate wage increase; they had not had a raise in nearly two years. (2.4)
**8-51.** This, then, is our goal for 2013: increase sales 35 percent. (2.5)
**8-52.** His writing skills are excellent; however, he still needs to polish his management style. (2.4)
**8-53.** We would like to address three issues: efficiency, profitability, and market penetration. (2.5)
**8-54.** Remember this rule: When in doubt, leave it out. (2.5)

## CHAPTER 9: SELF-ASSESSMENT—COMMAS

**9-45.** Please send us four cases of filters, two cases of wing nuts, and a bale of rags. (2.6)
**9-46.** Your analysis, however, does not account for returns. (2.6)
**9-47.** As a matter of fact, she has seen the figures. (2.6)
**9-48.** Before May 7, 1999, they wouldn't have minded either. (2.6)
**9-49.** After Martha has gone, talk to me about promoting her. (2.6)
**9-50.** Stoneridge, Inc., went public on September 9, 2014. (2.6)
**9-51.** We want the new copier, not the old model. (2.6)
**9-52.** "Talk to me," Sandra said, "before you change a thing." (2.6)
**9-53.** Because of a previous engagement, Dr. Stoeve will not be able to attend. (2.6)

**9-54.** The company started attracting attention during the long, hard recession of the mid-1970s. (2.6)
**9-55.** You can reach me at this address: 717 Darby Place, Scottsdale, Arizona 85251. (2.6)
**9-56.** Transfer the documents from Fargo, North Dakota, to Boise, Idaho. (2.6)
**9-57.** Sam O'Neill, the designated representative, is gone today. (2.6)
**9-58.** With your help, we will soon begin. (2.6)
**9-59.** She may hire two new representatives, or she may post-pone filling those territories until spring. (2.6)

## CHAPTER 10: SELF-ASSESSMENT—DASHES AND HYPHENS

**10-44.** Three qualities—speed, accuracy, and reliability—are desirable in any applicant to the data entry department. (2.7)
**10-45.** A highly placed source explained the top-secret negotiations. (2.8)
**10-46.** The file on Marian Gephardt—yes, we finally found it—reveals a history of late payments. (2.7)
**10-47.** They're selling a well-designed machine. (2.8)
**10-48.** A bottle-green sports jacket is hard to find. (2.8)
**10-49.** Argentina, Brazil, Mexico—these are the countries we hope to concentrate on. (2.7)
**10-50.** Only two sites—maybe three—offer the things we need. (2.7)
**10-51.** How many owner-operators are in the industry? (2.8)
**10-52.** Your ever-faithful assistant deserves—without a doubt—a substantial raise. (2.8, 2.7)
**10-53.** Myrna Talefiero is this organization's president-elect. (2.8)
**10-54.** Stealth, secrecy, and surprise—those are the elements that will give us a competitive edge. (2.7)
**10-55.** The charts are well-placed on each page—unlike the running heads and footers. (2.8, 2.7)
**10-56.** We got our small-business loan—an enormous advantage. (2.8, 2.7)
**10-57.** Ron Franklin—do you remember him?—will be in town Monday. (2.7)
**10-58.** Your devil-may-care attitude affects everyone involved in the decision-making process. (2.8)

## CHAPTER 11: SELF-ASSESSMENT—QUOTATION MARKS, PARENTHESES, ELLIPSES, UNDERSCORES, AND ITALICS

**11-28.** Be sure to read "How to Sell by Listening" in this month's issue of *Fortune.* (2.10, 3.2)
**11-29.** Her response (see the attached memo) is disturbing. (2.11)
**11-30.** *Contact* is an overused word. (3.2)
**11-31.** We will operate with a skeleton staff during the holiday break (December 21 through January 2). (2.11)
**11-32.** "The SBP's next conference," the bulletin noted, "will be held in Minneapolis." (2.10)
**11-33.** Sara O'Rourke (a reporter from *The Wall Street Journal*) will be here on Thursday. (2.11, 3.2)
**11-34.** I don't care *why* you didn't fill my order; I want to know *when* you'll fill it. (3.2)
**11-35.** The term *up in the air* means "undecided." (2.10, 3.2)
**11-36.** Her assistant (the one who just had the baby) won't be back for four weeks. (2.11)
**11-37.** "Ask not what your country can do for you . . . " is the beginning of a famous quotation from John F. Kennedy. (2.10, 2.12)
**11-38.** Whom do you think *Time* magazine will select as its Person of the Year? (3.2)
**11-39.** Do you remember who said "And away we go"? (2.10)
**11-40.** Refinements in robotics may prove profitable. (More detail about this technology appears in Appendix A.) (2.11)
**11-41.** The resignation letter begins, "Since I'll never regain your respect . . ." and goes on to explain why that's true. (2.10, 2.12)
**11-42.** You must help her distinguish between *i.e.* (which means "that is") and *e.g.* (which means "for example"). (2.10, 3.2)

## CHAPTER 12: SELF-ASSESSMENT—CAPITALS AND ABBREVIATIONS

**12-25.** Dr. Paul Hansen is joining our staff. (3.1)
**12-26.** New Caressa skin cream should be in a position to dominate that market. (3.1)
**12-27.** Send this report to ~~Mister~~Mr. H. K. Danforth, ~~rural route~~RR 1, Warrensburg, NY 12885. (3.1, 3.3)
**12-28.** You are responsible for training my new assistant to operate the Xerox machine. (3.1)
**12-29.** She received her ~~master of business administration~~MBA degree from the University of Michigan. (3.1, 3.3)
**12-30.** The building is located on the corner of Madison and Center Streets. (3.1)
**12-31.** Call me tomorrow at 8 a.m. ~~morning, pacific standard time~~ PST, and I'll have the information you need. (3.3)
**12-32.** When Jones becomes CEO next month, we'll need your input ASAP. (3.1, 3.3)
**12-33.** Address it to Art Bowers, Chief of Production. (3.1)
**12-34.** Please RSVP to Sony ~~corp.~~Corporation just as soon as you know your schedule. (3.1, 3.3)
**12-35.** The data-processing department will begin work on ~~feb.~~February 2, just one ~~wk.~~week from today. (3.3)
**12-36.** You are to meet him on Friday at the UN building in NYC. (3.3)
**12-37.** Whenever you can come, Professor, our employees will greatly enjoy your presentation. (3.1)
**12-38.** At 50 per box, our standard contract forms are $9 a box, and our warranty forms are $7.95 a box. (3.3)
**12-39.** We plan to establish a sales office on the West Coast. (3.1)

## CHAPTER 13: SELF-ASSESSMENT—NUMBERS

**13-21.** We need to hire ~~one~~1 office manager, ~~four~~4 accountants, and ~~twelve~~12 programmer-analysts. (3.4)
**13-22.** The market for this product is nearly ~~six~~6 million people in our region alone. (3.4)
**13-23.** Make sure that all 1,835 pages are on my desk no later than ~~nine o'clock~~9:00 a.m. (*OR* nine o'clock in the morning.) (3.4)
**13-24.** In 2004, ~~was the year that~~José Guiterez sold more than $50,000~~thousand dollars~~ worth of stock. (3.4)
**13-25.** Our deadline is ~~4/7~~April 7, but we won't be ready before ~~4/11~~April 11. (3.4)
**13-26.** ~~95~~Ninety-five percent of our customers are men. (*OR* Of our customers, 95 percent are men.) (3.4)
**13-27.** More than ~~1/2~~half the U.S. population is female. (3.4)
**13-28.** Cecile Simmons, ~~thirty-eight~~38, is the first woman in this company to be promoted to management. (3.4)
**13-29.** Last year, I wrote 20 ~~15~~-fifteen-page reports, and Michelle wrote 24 three-page reports. (3.4)
**13-30.** Of the 15 applicants, ~~seven~~7 are qualified. (3.4)
**13-31.** Our blinds should measure 38 inches wide by 64-1/2~~and one half~~ inches long by 7/16 inches deep. (3.4)

**13-32.** Deliver the couch to ~~seven eighty three~~783 Fountain Road, Suite ~~three~~3, Procter Valley, CA 92074. (3.4)

**13-33.** Here are the corrected figures: 42.70% agree, 23.25% disagree, 34.00% are undecided, and the error is 0.05%. (3.4)

**13-34.** You have to agree that 50~~,000,000~~ million U.S. citizens cannot be wrong. (3.4)

**13-35.** We need a set of shelves 10 feet, ~~eight~~8 inches long. (3.4)

## CHAPTER 14: SELF-ASSESSMENT—VOCABULARY

**14-29.** except (4.1)

**14-30.** device (4.1)

**14-31.** loath (4.1)

**14-32.** ordinance (4.1)

**14-33.** precedence (4.1)

**14-34.** than (4.1)

**14-35.** who's (4.1)

**14-36.** In this department, we see **a lot** of mistakes like that. (4.2)

**14-37.** In my **judgment**, you'll need to redo the cover. (4.3)

**14-38.** He decided to reveal the information **regardless** of the consequences. (4.2)

**14-39.** Why not go along when it is so easy to **accommodate** his demands? (4.3)

**14-40.** When you say that, do you mean to **imply** that I'm being unfair? (4.2)

**14-41.** She says that she finds this sort of ceremony **embarrassing**. (4.3)

**14-42.** All we have to do is try **to** get along with him for a few more days. (4.2)

**14-43.** A friendly handshake should always **precede** negotiations. (4.3)

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