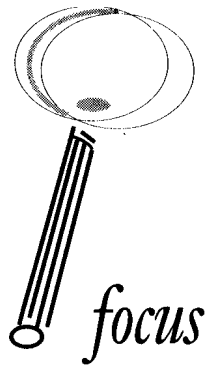


# 1

## Introduction to the Business Writing Process



### Learning Objectives

By the end of this chapter, you should be able to:

- Identify at least one attitude that impedes effective writing.
- List the four steps in the Business Writing Process (BWP).
- List three strategies for developing an effective business writing style.
- Define the two main differences between letters and memos.

Know where you're going right from the beginning. This takes preparation. Use a process to prepare for and organize your trips.

### HOW THIS COURSE DIFFERS FROM OTHERS

**You will find that *Fundamentals of Business Writing* differs from other writing courses in several ways. First, it challenges you to spend more time planning and revising documents and less time actually writing them.**

**Second, it asks you to follow a four-step process: to analyze your purpose and audience and to organize the content of your document before even considering writing it. The course then asks you to write your draft quickly without revising it as you write. In this course, revising is a separate step—the very last one.**

***Fundamentals of Business Writing* also differs from other courses in that it offers you specific tools you can use whenever you sit down to write. For**

example, it offers you a Purpose and Audience Analysis Sheet, several brainstorming techniques to generate ideas, and an Editor's Checklist to follow in revising documents.

In addition, this course promotes the formatting strategies that leading U.S. companies are adopting to make their documents more "reader friendly." Specifically, the course encourages you to use headlines and vertical lists in both letters and memos. It also recommends that you frame your messages with plenty of white space.

While this course differs from others in the four-step process, specific tools, and formatting strategies it offers, it adheres to age-old principles of good writing. The course stresses the skills needed to write clearly and concisely. It affirms the importance of well-constructed paragraphs and streamlined sentences. It acknowledges the usefulness of transition words and phrases like *however*, *for example*, and *as a result* in creating a smooth flow from sentence to sentence. It also encourages you to use the active rather than the passive voice. In these respects, *Fundamentals of Business Writing* champions the fundamentals of all good writing.

At the same time, *Fundamentals of Business Writing* offers fresh approaches to age-old problems. To overcome writer's block, for instance, try "writing as you speak," at least in the first draft of your document. Open yourself to new experiences in learning to write efficiently and effectively.

This course encourages you to break some old molds for the sake of new growth. Learning a new writing process, new tools, and new strategies will require changing some old attitudes.

## OLD ATTITUDE

Many people believe that writing is a chore—one to be put off for as long as possible. How often have I heard colleagues exclaim, "I hate to write!" Recently, I talked with a colleague who is coauthoring an article for a journal. He has written his part of the article and, for months, has been coaxing his coauthor to finish his part with no luck. We discussed the matter, and my colleague said to me, "He just doesn't like to write. He wants me to do it all." While I don't know my colleague's coauthor, I do know that many people who "hate to write" feel they write inefficiently and ineffectively. And, no one likes such feelings of inadequacy.

## NEW ATTITUDE

Writing can be a stimulating and satisfying task—a process that can help us clarify our thinking and communicate that thinking to others effectively. In mastering the four-step process that *Fundamentals of Business Writing* offers, writers who once hated writing begin to enjoy it. The course shows writers how to prepare for writing tasks, and whenever we prepare for any activity—an interview or a meeting, for example—we become much more comfortable, confident, and articulate.

## THE FOUR STEPS OF THE BUSINESS WRITING PROCESS (BWP)

*Fundamentals of Business Writing* emphasizes a four-step process for writing efficiently and effectively:

1. Analyze your purpose and audience.
2. Organize the document.
3. Write.
4. Revise.

Any process can help us organize our activities more efficiently. For example, rather than wonder how to proceed each time we shampoo our hair, we follow a process:

1. Wet the hair.
2. Apply shampoo.
3. Massage the shampoo into the hair for one minute.
4. Rinse out the shampoo.

The same is true of writing. We shouldn't wonder how to proceed each time we compose a letter, memo, or report. We can proceed efficiently if we make the four steps of the BWP a habit.

This process presents writers with a beginning, middle, and end to their writing tasks. It alleviates writer's block and associated maladies. Writers see the position, proportion, and importance of information before they begin writing, so they can tightly organize their information. They also learn to separate writing from revising. As a result, they no longer labor over making their first drafts perfect.

## STRATEGIES FOR ACHIEVING AN EFFECTIVE BUSINESS WRITING STYLE

Style has to do with the way you write, not what you write. To develop a clear, concise, and appealing business writing style, embrace attitudes that will help you, and discard those that impede you. Attitudes that influence our style are like recorded messages on an audiotape. Whenever we write, our subconscious clicks on the tape recorder, and the messages are played back: "Adopt a formal style when writing a business letter," or "Use long-winded phrases—they signify a sophisticated mind."

Your attitudes influence the strategies you use to develop your style. For instance, if you believe that you should write impersonally, you will use passive subjects and verbs so as to distance yourself from the subject matter. (See Chapter 9 for a discussion of the passive voice.)

This course offers you three sets of strategies to help you develop an effective business writing style: formatting, streamlining, and clarifying. We

will practice these techniques in Step 4, when we focus on revising documents.

### **Formatting**

Formatting means adopting a journalistic style of organizing information on a page: writing short paragraphs, using headlines, and leaving white space. These formatting tools help to create a physically attractive document, one that invites the audience to read it. (Chapter 7 discusses formatting in detail.)

### **Streamlining**

Streamlining is a strategy for achieving conciseness. It entails verifying that each word in a document contributes to communicating information. When you streamline, you identify padding in sentences and excise it. Streamlining involves getting rid of “canned” language and long-winded expressions. It therefore helps you to personalize your style: to make it more lively and natural. (Chapter 8 discusses streamlining in detail.)

### **Clarifying**

Clarifying means honing your message so that it conveys clearly to your reader who, exactly, is doing what, exactly, to whom. Clarifying entails making sure that the subject in each sentence is active—actually doing the action of the verb—and not passive—merely receiving the action of the verb. Clarifying also means using strong verbs that vividly describe the action taking place. In addition, clarifying helps you to personalize your style, for it entails bringing people into your writing—assigning responsibility to yourself and others. (Chapter 9 discusses clarifying in detail.)

## **TYPICAL TYPES OF BUSINESS DOCUMENTS**

The four steps of the BWP and the three strategies for achieving an effective business writing style apply to all types of business documents. Typical types of business documents include letters, memos, reports, and proposals.

### **Letters**

Use the letter format when writing to someone *outside* your own company. Use stationery printed with your company’s name, address, and telephone number. The letter format includes the following information.

At the top of the page:

- The date.
- The full name and address of the person to whom you are writing.
- A salutation, as in “Dear Ms. Smith.”

At the bottom of the page:

- A complimentary closing, as in “Sincerely.”
- Your signature.
- Your title, if appropriate.
- Additional information regarding enclosures or copies of the letter, if you are sending copies to other people.

(See Chapter 7 for examples of letters and details on full-block and more traditional formats.)

Chances are that you will adopt a more formal style in letters than in memos meant for internal use. Of course, your style will depend on your relationship to your reader and what you know about him or her. If you’re writing to a business colleague, someone you know, your style will be less formal than if you’re writing to a customer you’ve never met.

Letters, like meetings and phone conversations, often begin with a friendly introduction—a sentence that creates the framework and sets the tone for the information to come.

Letters should be short—one to two pages at most. Readers do not expect five- or ten-page letters. If you have more information to convey than will fit into a one- or two-page letter, you can put additional information in an attachment: a fact sheet that lists your company’s services, for example.

## Memos

Use the memo format when writing to people *inside* your company. Memos have a different format than letters. Memos usually have a four- or five-line heading:

To:

cc: (Include here the list of people to whom you’re sending copies.)

From:

Date:

Subject: (Sometimes people use “Re:” [an abbreviation for the word “regarding”] instead of the word “Subject:”)

Attachments: (Include this heading only if relevant.)

In contrast to letters, memos do not have a complimentary closing, or signature and title at the bottom. As for references to additional information and copies of the memo, make these references at the top of the first page.

Like letters, memos tend to be short and to the point. Unlike letters, memos usually leave out introductory comments. They state in the first sentence why the writer is writing.

## Reports

Reports tell audiences about the achievements, research, or activities of the writers (and their associates). Short reports, usually one to four pages in length, include progress reports, trip reports, and meeting reports. Progress reports describe work accomplished and work yet to be accomplished. Such reports may be organized according to task, topics, or the chronology in which the tasks have been or will be undertaken. Trip and meeting reports may also be organized according to topics or to the chronology of activities, depending on the importance of one or the other to the audience. (See Chapters 3 and 4 on how to organize documents.)

Longer reports include research reports, audit reports, and annual reports. Research reports cover study findings and draw conclusions from these. Their audience usually consists of top executives and/or high-level managers. Because they are often lengthy—more than 12 pages—they usually contain a one- to two-page executive summary covering the purpose of the research, the scope (what the researchers studied), and the conclusions. Unlike other summaries, the executive summary appears at the beginning of the report, not at the end.

Audit reports fall into one of two categories. Some cover the degree to which a company is complying with federal, state, and internal regulations. Other audit reports focus on the use of funds rather than compliance issues. Audit reports are written for the top executives of a company and bring problems to their attention. Like research reports, they usually include an executive summary covering the purpose of the audit, the scope, and the conclusions. In audit reports, the conclusions cover both the principal findings and the recommendations.

Annual reports are written for the shareholders of a company. They focus on presenting the corporation's achievements and financial information in an upbeat way. They "sell" the company and invite investment; hence they contain photographs and graphs, and are usually printed in color on glossy paper.

## Proposals

Proposals aim at selling the audience on a particular product, service, or solution to a problem. They may be directed at internal audiences or external ones. In some companies, people write proposals in response to external requests for proposals (RFPs) or bids. Such proposals usually contain three sections:

1. A description of the product, service, or solution proposed, including its technical details.
2. An explanation of how the project will be managed.
3. A breakdown of the costs involved.

Proposals must be persuasive: They must present the solution as being both attractive and feasible. They must persuade the audience that the benefits of the solution outweigh the costs.

## SAMPLE DOCUMENTS I AND II

In this course, we will work with two sets of sample documents: Sample Document I and Sample Document II.

### Sample Document I

The first set, which we will call Sample Document I, will be short documents (either letters or memos) that you and I will create from scratch, following the four-step BWP process. I will lead you through the first three steps of the BWP, showing you how to analyze, organize, and draft a document from scratch.

As we go through these steps, I will create my own Sample Document I to show you how the steps work. At the same time, I will ask you to practice these steps by creating your own Sample Document I, preferably based on a topic you need to write about in your own job. Thus, as we go through the first three steps—up through the drafting of a document—you will be able to compare your progress with mine, step by step.

When we reach Step 4, which consists of revising documents, we will put aside, temporarily, both your Sample Document I and mine. We will focus first on the editing skills you will need to develop before you can revise your own draft properly.

### Sample Document II

To help you develop your editing skills in Step 4, I will give you a second document to revise. Sample Document II consists of a poorly written draft—one that needs extensive revising. I deliberately introduce this second document because it exemplifies more problems than either your Sample Document I or mine will suffer from. Our drafts will reflect the benefits of having gone through the first three steps of the BWP. In contrast, Sample Document II reflects, among others, the problems that arise when writers don't go through these steps.

Thus, by revising Sample Document II, you will further appreciate the benefits of the four-step BWP. Also, because Sample Document II contains more problems than either your Sample Document I or mine are likely to contain, Sample Document II will serve as a better exercise for learning how to edit.

We will make five sweeps or passes through Sample Document II. Each time, we will concentrate on a different aspect of editing.

After working together in revising Sample Document II, we will return to our respective Sample I documents. You will then revise your Sample Document I, applying the editing skills you learned in revising Sample Document II. You will then have a chance to compare your Sample Document I with mine. At the end of the course, your Sample Document I will reflect your mastery of the four-step BWP process. Thus, it will serve as a model you can refer to in future writing tasks.

**Think About It . . .**

Answer appears at the end of this chapter.

Choose a topic and an audience for Sample Document I—preferably a topic that you need to write about at work. Select a topic that you can cover in a letter or memo: one to two pages. Pick a topic relevant to your manager, your colleagues, or your customers. Also pick a topic that deals with an event, task, issue, or problem with which you are familiar. You will use this topic in learning the four-step BWP. In Chapters 2 through 5, you will learn how to analyze your purpose and audience, organize the content of your document, and write a draft. You will then put the draft aside until Chapter 11, when you will revise it, using the editing skills you developed in Chapters 6 through 10.

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## OUTLINE OF CHAPTERS

Chapter 2 covers Step 1 of the BWP. It shows you how to analyze your purpose and audience. You will then apply the method and analyze your purpose and audience for Sample Document I. To this end, you will use a tool I devised to help you: the Purpose and Audience Analysis Sheet (PAAS).

Chapter 3 introduces you to Step 2 of the BWP. It gives you tips on how to begin organizing documents by brainstorming your ideas, researching missing information, and chunking information. You will begin organizing Sample Document I.

Chapter 4 concludes Step 2 of the BWP. It shows you how to finish organizing your document by sequencing your chunks in logical and strategic patterns and then creating a substantive outline, complete with headings, topic sentences, and bulleted points. You will finish organizing Sample Document I.

Chapter 5 deals with Step 3 of the BWP: writing your draft. It gives you some tips on writing this draft quickly. You will then write a draft of Sample Document I.

Chapter 6 introduces you to Step 4 of the BWP: revising. It introduces you to a new tool: the Editor's Checklist, and to a new sample document: Sample Document II. In this chapter, you will put aside your draft of Sample Document I to concentrate on making the first of five sweeps through Sample Document II. You will revise this document according to the first four points on the Editor's Checklist.

In Chapter 7, you will make your second sweep through Sample Document II. You will learn formatting techniques to make documents more visually appealing to readers.

In Chapter 8, you will make your third sweep through Sample Document II. You will learn techniques to streamline sentences.

In Chapter 9, you will make your fourth sweep through Sample Document II. You will learn techniques helpful in clarifying sentences and verbs.



In Chapter 10, you will make your fifth and final sweep through Sample Document II. You will learn to recognize and correct typical errors in grammar, word choice, and punctuation. You will also learn about software programs and reference books that can help you identify and correct mistakes in grammar, spelling, and punctuation.

In Chapter 11, you will return to your Sample Document I draft and revise it, using the Editor’s Checklist and the editing skills you developed in Chapters 6 through 10.



In Chapter 1, you discovered that *Fundamentals of Business Writing* is a hands-on course in which you learn a process applicable to producing all types of business documents. In this chapter, you learned about some of the attitudes that impede writing effectively. You can now name the four steps of the BWP, as well as three strategies helpful in developing an effective business writing style. You learned the main differences between a letter and a memo and now have an overview of other types of business documents. When you complete this course, you will communicate your ideas in writing more confidently and enthusiastically. Audiences will read your documents quickly and with interest.

### Answer to “Think About It. . .” Question from This Chapter

To give you a document you can compare to your Sample Document I, I will create, from scratch, a letter on the following topic.

The letter invites managers of training organizations at Dallas/Ft. Worth high-tech companies to act as steering committee members. The steering committee will oversee the development of a business writing course. My company, ACME Corporation, will supply the resources for creating this course.

