



Preparing Business Documents

Learning Outcomes

By the end of this unit the learner will be able to:

- ✓ Understand how to deal with specific business requests.
- ✓ Understand how to create effective business cases, proposals, and reports.

Preparing Business Documents

Types of Letters

These are some of the types of letters you may have to prepare:

- Requests for information
- Letters of reference (recommendation)
- Letters of refusal
- Letters of persuasion

Information Requests

The most emphatic positions in a letter are the first and last sentences. Readers tend to look at them first. Capitalize on this tendency by **putting your most significant statement first**. The first sentence of an information request is usually a question or a polite command. Do not explain or justify your position unless you believe your request will be refused. This saves time and immediately tells the reader what you want.

The **body of the letter** can provide the necessary details. Make it easy to read and use highlighting techniques to make the main points stand out, such as lists and bullets. Items in a list are much easier to read than items bunched in a paragraph. They should also be phrased similarly or parallel.

The quality of the information obtained from a request often depends on the clarity of the enquiry. Analyze your needs, organize your ideas, and frame your request logically, and you are likely to receive a meaningful answer.

Use the **final paragraph** to ask for specific action, to set an end date if appropriate, and to express appreciation.

Letters of Recommendation

Here are some guidelines you may want to follow when writing a letter of recommendation.

- Identify the reason for writing.
- Suggest the confidentiality of the recommendation.
- Establish your (or your manager's) relationship with the client.
- Identify the length of employment and job duties if relevant.
- Describe the applicant's professional and personal qualities.
- Describe the applicant's relationship with others.
- Include specific details and examples that illustrate the applicant's personality and performance.

- Be especially careful to support negative comments with verification. (Not that he was slower than other receptionists, but he answered 25 calls an hour while most receptionists averaged 40 an hour.)
- Compare the applicant with others in his or her field.
- Offer an overall rating of the applicant.
- Summarize the significant attributes of the applicant.
- Draw a conclusion regarding the applicant.

Letters Refusing Requests

When you must refuse a request and you feel the refusal is likely to antagonize, upset, hurt or anger the reader, use the indirect approach. Try the following writing plan:

- Start with a buffer that identifies previous correspondence either incidentally or as a subject line, and then begins with a neutral statement on which both reader and writer can agree.
- Then add a key word or phrase that leads naturally to the explanation.
- The explanation presents valid reasons for the refusal and avoids problem words that will be seen as negative. The bad news can be de-emphasized to soften the blow. Avoid language that causes hard feelings.
- If possible, suggest an alternative or a substitute, or perhaps a compromise.
- Renew good feelings with a positive statement, without referring to the bad news.

These same general principles of indirectness are appropriate whenever bad news must be delivered. You may worry that the indirect approach is unethical or manipulative because the writer deliberately delays the main idea. But consider the alternative: breaking bad news bluntly can cause pain and hard feelings. Remember, “It’s not what we say but how we say it.” Your goal is to be a compassionate yet effective communicator.

Letters of Persuasion

The ability to persuade or to sell an idea is a key factor in the success you achieve in your career and in your interpersonal relationships. Persuasive individuals are highly valued in today’s organizations. Persuasive individuals become decision-makers because their ideas generally prevail.

Persuasion is necessary when resistance is anticipated or when ideas require preparation before they can be presented effectively. Persuasion requests are generally more effective when they are indirect because the writer has the opportunity to lay the groundwork before actually making the request.

Persuasive appeals generally fall into two broad groups: emotional and rational. **Emotional appeals** are associated with the senses. They include how we see, feel, taste, smell, and hear. Strategies that arouse anger, fear, pride, love, and satisfaction are also emotional.

Rational strategies are those associated with reason and intellect. They appeal to the mind. Rational appeals include references to making money, saving money, increased efficiency, and making the best use of resources.

Preparing Business Documents

Business Cases

How can you create a compelling case for change? Share an idea for a compelling project? You write a business case!

When you write a business case, you concisely present the benefits of the initiative and include an argument about what makes it a good idea. Your business case is not complete until it also has a complete cost/benefit analysis to assess the financial impacts of the change.

Set up your business case by including:

- Executive summary/business case summary: Although this is found at the beginning of your business case, it is a summary of all that has been brought forward, and as such, should be written last.
- An introduction to the proposed change
- Appropriate background information
- A mission statement for the proposed change, if desired
- Benefits accrued from the change
- Conclusions from your research
- Why the organization should consider the idea
- Principles to guide development
- Recommended scope of change
- Projected cost/benefit analysis
- Cost of recommended program or change
- Measurement, outcomes, and evaluation methods
- Anticipated overall results

Appendix information should include:

- Glossary of frequently used terms
- FAQs
- Endorsements
- Sources used

Requests for Proposals

Companies of all sizes will often use a **Request for Proposals** (also known as an RFP) to solicit competitive bids on projects. When a company knows exactly what it wants, whether it is a computer upgrade or a feasibility study, preparing an RFP allows them to specify their requirements. They can then invite companies to submit proposals, and then compare what the different bidders can do.

Some of the cardinal rules for RFP's are:

- Preparation, preparation, preparation.
- Know what you want.
- Know what the people who respond to your RFP will need to know and what they will want to know.

Writing Reports

There are several basic formats or approaches to writing reports. The type that you use will depend on how formal the report needs to be, and how much detail your readers need. You can write internal reports (memorandum report), a letter style report, a short report, or a formal report.

Reports typically make use of headings and subheadings to separate the information. This gives your reader a break from reading solid pages of text and also allows people to find what they want to read quickly.

Typically, a longer, more formal report has the following parts.

- **Cover:** Includes the name of the organization, your department, and the title of the report.
- **Letter of Transmittal:** Explains how, why, and under what circumstances the report was prepared.
- **Title Page:** Title of the report, who the report was prepared for (name and title of recipient), author's name, and date.
- **Synopsis or Executive Summary:** An informative summary covering the purpose of the report as well as key findings, conclusions, and recommendations.
- **Table of Contents:** Contains main divisions with page numbers.
- **List of Illustrations:** Needed only if there are many illustrations and graphs.
- **Introduction:** Includes whatever the reader needs in order to understand the report, such as the background, scope, limitations, details about your approach or method, and criteria used in making your evaluation.
- **Body/Discussion**
- **Summary**
- **Conclusions**
- **Recommendations**
- **Appendix:** May include statistics, tables, and other information of interest to only some readers (so it would not be appropriate in the body of the report).
- Very extensive reports may also contain **footnotes** and a **bibliography**.

Shorter, less formal reports will include only some items from this list.

Documentation

If you use data from secondary sources when you are preparing your report or your business case, the data must be documented, meaning the source of that information must be cited. Using someone else's

ideas without giving credit for them is **plagiarism**. Even when you paraphrase and put others ideas in your own words, they should be documented.

Use direct quotations sparingly. There are three situations when you will find it useful to quote someone's exact words: when they are an expert and you want to emphasize their opinion; when you want to use their exact words before you criticize them; or you want to repeat identical phrasing because of its precision, clarity, or aptness.

This isn't a fun part of writing, but it does have its uses. Citing sources strengthens your arguments and shield you from charges of plagiarism.

The greatest challenge is that all business writers do not follow the same formatting style. Some companies who do a lot of report writing will specify a **particular style**. Styles continue to evolve, which makes things a little more complicated.

There are a couple of frequently used style guides, particularly in North America, including:

- American Psychological Association (APA)
- Chicago Manual of Style
- Modern Language Association Method (MLA)

Electronic sources generally follow print source formatting, although you won't often have page numbers. You should also include the date that you accessed the information. You must include the entire URL since sources can be moved.

There are also many **academic disciplines** (including science, legal, journalistic, government, medicine, business, and industry) that require a particular style depending on their documentation system. These can vary around the world.

For the most recent updates, we suggest that before you start your documentation, you refer to the actual handbooks, Internet sites, or subscribe to current versions of the text that you need.

As with many of the rules we cite with writing, the important thing is to be consistent. Don't mix two or more styles within one document. As you can see on the next page, different styles can lead to very different results.

One author, in Chicago Manual style:

Lynne Truss. *Eats, Shoots & Leaves: The Zero Tolerance Approach to Punctuation* , New York, Gotham Books, 1993

One author, in American Psychological Association (APA) style:

Truss, Lynne (1993). *Eats, shoots & leaves: The zero tolerance approach to punctuation*. New York, Gotham Books, 1993

**One author, in British Broadcasting Corporation News Style Guidelines:
Eats, Shoots & Leaves: The Zero Tolerance Approach to Punctuation, Lynne Truss, Gotham Books, New
York, 1993**

Test Your Knowledge

Editing Techniques

How can you improve the document?

What word choices will you change?

How can you add emphasis to this piece of writing?

How can you re-write paragraphs to make them stronger?

Further Reading:



