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## 1A Determine audience and purpose for the document

When preparing a business document, it is important to have a clear idea of who the document is for and what the document is about. This ensures that your communication is professional and represents the organisation in the best possible way.



### Understand the document's purpose

Business documents are used for many purposes. The following chart outlines a range of situations when a simple business document needs to be prepared, with examples of what the document might be about. Such documents may be for external customers (such as clients or suppliers) or internal customers (such as staff within an organisation). The role of many of the documents is to communicate information. Other documents may be prepared to store data or keep a permanent record of information.

**7**

**Provides statistical or factual information**

Provides data such as:

- monthly sales figures
- meeting agendas
- minutes of meetings
- meeting outcomes
- new products.

**8**

**Provides database information**

Provides information such as:

- lists of clients
- addresses
- personnel details.

**9**

**Provides evidence of the organisation's activities**

Provides evidence of:

- telephone calls
- copies of letters sent.

**10**

**Keeps a permanent record of decisions made**

Keeps records such as:

- minutes of meetings.

## Who is the document for?

Once you know the purpose of your document, the next step is to be clear about who you are writing it for. Who is your audience? Understanding the purpose of your document and the audience you are writing for affects what you write, how you write it and in what format you present it. You must be clear about these topics before you start preparing your draft.

Business documents can be for internal customers – all staff members, a department or the management team. Alternatively, they can be for external customers – buyers, service providers or government departments.



# 1B

## Determine the format and structure

After you have established the document's audience, content and reason or purpose, you also need to think about the best way to present your document, in terms of its format and structure. Broadly, there are two types of documents: documents that communicate information and documents that store information.

When you are asked to produce a document, you should be very clear about what the document is for. This helps you decide how much you need to write and what format the document should take. You need to be aware of the communication protocols that determine the format and structure of your communication.



### Types of business documents

Documents that store information include reports from databases, responses to questionnaires and product records.

Documents that communicate information include:

- business letters and faxes
- memos and emails
- briefing papers
- meeting documents
- reports; for example, financial reports, research reports, progress reports
- tables; for example, schedules, financial spreadsheets
- forms; for example, questionnaires, surveys.

... continued

**Company name here**

## Memo

**Date:** 1/07/2016

**To:** [ Click here and type names ]

**Cc:** [ Click here and type names ]

**From:** [ Click here and type names ]

**Re:** [ Click here and type subject ]

[ Click here and type your memo text ]

## Business letters

Letters are used to pass on a wide range of business information. They are used when evidence or a record of business activities is required. They also provide a personal point of contact between your organisation and its clients. Letters that are well-written and well-presented give a good impression of an organisation. Here are some common types of letters.

### Acknowledgments

For example:

To confirm that your organisation has received something or to acknowledge a job application

### Complaints and claims

For example:

To let a branch of your organisation know of a customer complaint or to inform a supplier they have delivered faulty goods

Here are the parts of a business letter.

#### Date

The convention in Australia is to write the day, month and year; for example, 12 May 2016.

#### Sender's address

This is not necessary if your organisation uses letterhead paper.

#### The name, title and address of who you are sending the letter to

If you do not know the title of the person, you should try to find out; if you are unsure how a woman prefers to be addressed, use Ms.

#### The greeting

This is sometimes called the salutation. This is usually 'Dear', followed by the same title and name as used in the inside address. If you are not sure of the person's gender, write their full name; for example, 'Dear Pat Smith'. If you do not know the name of the person, you may have to write 'Dear Sir/Madam'.

#### Body

This is the main content of the letter. You should consider a friendly opening and then state the main point of the letter.

#### Close

In a business letter, the formal close is 'Yours sincerely' if you know the name of the person you are writing to, or 'Yours faithfully' if you do not.

#### Signature and identification

This is usually about six spaces below the close. After the signature is the sender's name and position in the organisation (the position is usually in bold).

## Example: completed fax

### East Asian Artefacts

## Facsimile

To: Oriental Boutique

Attention: Mr Chau

Fax: (04) 3688 1234

From: Bernie Periera

Date: 5 June 2016

Subject: Price list

No. of pages: 3 (incl. cover page)

The following pages provide details of the prices and sizes of the desks, as per your request.

Delivery would take about three to four weeks.

Thank you for your inquiry.

Regards

*Bernie*

Ph: 8544 1255

## Business memos

A memo is a popular format for sending information in an office. Memos are usually sent when information needs to be forwarded to a number of people or if a record of correspondence is required for future reference.

The subjects of memos might be:

- general announcements about staff policies, safety procedures or social events
- correspondence between a manager and staff about leave applications or performance appraisals
- correspondence between teams or departments about time lines and new projects
- short reports to staff about decisions made by team leaders or managers.

## Business emails

Emails are sent when you want to relay a message quickly. In some organisations, emails are more common now than memos or faxes. They can be sent within the organisation or to external clients. Like faxes, they must be addressed accurately.

There are communication protocols for business emails. Usually emails should be formal, even though you may know the person you are emailing very well. In business, your email could be forwarded to someone else, such as the recipient's manager, so an informal style may not be acceptable.



### Example: the language of emails

Look at the following email message. Although it gets the message across, it is too informal for a business email. Joe may need to pass this on to the marketing manager. This type of language is more appropriate for your personal emails.

Send	To...	joblow@bigpond.net.org
	Cc...	
	Subject:	

Hi Joe. How are things with you these days? Could you let your marketing branch know that we received their information? It was spot on. Cheers. Costa

The following email message would be more suitable, even if Costa knows Joe quite well.

Send	To...	joblow@bigpond.net.org
	Cc...	
	Subject:	

Dear Joe

Please let your marketing branch know that we received their information. It was very helpful and included exactly the information required about prices, deadlines and ordering procedures.

Regards

Costa

## Agendas

An agenda contains details of where and when a meeting is to be held and a list of the items to be discussed at the meeting. Some agendas list the names of the people who will speak to each item. The agenda is given to all those invited to the meeting in advance, so they can prepare any papers or thoughts they may have on any items that will be discussed at the meeting.

Most organisations have a preference for how their agendas are to be set out. If you are new to an organisation, ask if there is a template you should use or you could copy an agenda from a previous meeting.

### Example: agenda for a staff meeting

#### **Reynard Real Estate Staff meeting**

Date: Tuesday 2 April 2016

Time: 2 pm

Location: Board room

#### **Agenda**

Chair: Doug Kosovitch

Minutes: Shelley Andersen

- Apologies
- Minutes of the previous meeting
- Business arising
- Correspondence – Darren
- Financial report – Craig
- Sales report – Wendy
- Forthcoming auctions – Joseph
- Promotional activities – Erica
- Other business

Next meeting: Tuesday 9 April 2016

## Minutes

Minutes formally record what happens at a meeting. Minutes are generally set out in the order of items as outlined in the agenda. They must be a clear and accurate account of what was said at the meeting, who reported each item and of decisions that were made about any action to be taken and who would be responsible. They can be an important record for the organisation.

## Presentation documents

Presentation documents can include brochures, notices, advertisements and screen display presentations such as Microsoft PowerPoint presentations. Such documents need a great deal of thought because they must be attractive, clear and concise. Many software programs are available that make producing such presentation documents easier.

The structure of presentation documents will vary but there are some features you need to remember:

- If the document is to be presented on screen, you should use a sans serif font (for example, Arial) and the smallest font size should be 28 points.
- Don't have too much text on one slide and use plenty of space.
- Each slide should only contain the main points, not the full text, of what the person presenting wants to say.



## Intranet and internet documents

In your organisation, you may need to access on-screen documents. This may be via the intranet (internal internet), which can only be accessed by employees and other authorised people, as well as the internet. Here are the main things to remember about on-screen document requirements.

### On-screen document requirements

- Any on-screen text should be in a sans serif font; for example, Arial, Tahoma
- Writing style should be clear, concise and in plain English
- Screen readers are software applications that identify and interpret what is being displayed onscreen, so ensure your message is clear
- Avoid long pages of text that the reader has to scroll down
- Provide useful, hyperlinked navigation icons, such as links to headings and back buttons

## Passive and active language

Documents such as reports are always formal, even if you know the people you are writing for. Formal language does not mean passive language. Wherever possible, you should choose to write in active language, which means you mention the person who is doing the action first. The meaning is then much clearer to the reader. The examples below clearly show the difference between passive and active language.

### Passive and active language

Passive: The report was written by John Smith.

Active: John Smith wrote the report.

Passive: The material you ordered was sent to you by our city branch.

Active: Our city branch sent the material you ordered.

Passive: The annual report was discussed by the Board.

Active: The Board discussed the annual report.

## Inclusive language

Your language must also be inclusive. This means writing for all types of people. No-one must feel that you are excluding them in what you have written. For example, don't make assumptions about the gender of people in specific jobs. If you are writing to a manager, don't assume it is a man or that a receptionist is a woman.

Don't assume the people reading your document will be of the same gender, ethnicity or ability as you. Instead of using 'he' or 'him', use 'he or she' or the plural pronoun 'they'. Most places prefer the plural use, but you will need to find out what style your organisation prefers.

Be careful not to use discriminatory language such as demeaning terms like 'girls' for 'women' or unnecessarily imply gender to roles such as 'chairman' instead of 'chairperson' or 'chair'.

## Choose software

Sometimes you have to choose between word processing and spreadsheet software if you are producing a table in your document. Here are examples of the appropriate software to use for various documents.

Reports containing mainly text

└ Word processing software

Reports containing mainly figures

└ Spreadsheet software

└ Accounting software

Letters and memos

└ Word processing software

└ Desktop publishing software

└ Digital image editing software

Reports containing mainly text

└ Word processing software

Client and product details

└ Database software

└ Spreadsheet software

## 2A

## Develop draft document to communicate key points

Although this is only a first draft, you should think about how you will structure the document so the information is presented logically. Most documents, even short ones, should include:

- an introduction describing what the document or message is about
- the main text, which has the sentences and paragraphs describing the details of the information
- a conclusion summarising the key points and indicating any outcomes, recommendations and actions to be taken.



### Start writing

A good way to start writing is to put your key points into sentences and paragraphs straightaway. At this point, don't worry too much about whether or not you have used exactly the right wording or punctuation. Remember this first writing attempt is only a draft – you have a long way to go. It is not the finished product. Put everything you think you need to include down on paper. Don't try to make it sound perfect as you do this or you will lose the flow of your thoughts. Perfecting the draft comes later.

As you write, remember who your audience is. Remember the purpose of the document. When people receive information, they need to be able to understand the information and know what they are supposed to do with it.

Then check that you have included all your key points and not omitted anything important.



10

**Check the number of times you have used 'that'.**

Many of these can be deleted. For example, they can be deleted in this sentence:

'The manager found that he could not contact the client by phone, so he thought that it would be a good idea to write a letter instead.'

11

**Do an initial spelling and grammar check, using your software's spellcheck function.**

In the following sentence, three errors were highlighted.

'The manager aksed the receptioist to gave the report to her.'

Mistakes in spelling will be underlined in red (for example, 'aksed' and 'receptioist'). Any grammar mistakes will be underlined in green (for example, 'gave').

## Checklist for a draft document

Use the checklist below when you need to check a document you have drafted.

### Draft document checklist

- Does the document have a clear beginning, middle and end?
- Have I remembered to write using active language?
- Are the points in a sensible order?
- Have I written in plain English?
- Is the length of my sentences varied?
- Do the sentences have only one main point?
- Have I used alternative words instead of repeating words over and over again?
- Have I used an appropriate number of adjectives and adverbs?
- Have I written something only once and not repeated it?
- Have I only used the word 'that' when necessary?
- Have I done an initial spelling and grammar check, using my software's spellchecker?

- 1** Identify the tasks to be completed.
- 2** Assess the time and resources needed to complete the tasks in line with organisational parameters, such as work procedures and quality manuals.
- 3** Prioritise tasks in order of importance.
- 4** Estimate and continually update your time lines.
- 5** Communicate issues relating to your workload clearly and effectively with other team members as needed.

## Practice task 7

1. Think about anything you have written at work or when studying. Did you try to write it slowly in the belief that this was going to be the first and only copy? How successful was this approach?

2. Why do you think the advice to just write down everything straightaway could be a good strategy?

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## Topic 3

### Review document

Reviewing your document involves reading over your draft to check it for accuracy, appropriate tone, good presentation and correct use of plain English. Any written business document should follow the four C's, which means they should be clear, concise, correct and courteous. In other words, it should be written so it is easy for the reader to understand the information.

In this topic you will learn how to:

- 3A Check draft for suitability of tone for audience, purpose, format and communication style
- 3B Check draft for readability, grammar, spelling, and sentence and paragraph construction
- 3C Check draft for sequencing and structure
- 3D Check draft to ensure it meets organisational requirements
- 3E Ensure draft is proofread, where appropriate, by supervisor or colleague

Have you used the right tone for your readers? Ask yourself whether the tone you have used will maintain good relations between your organisation and its clients or between you and your colleagues.

Here are examples of tactless and tactful tone.

#### Tactless tone

'Obviously, if you had read the instruction manual carefully you would not have had any trouble installing the equipment. Just look at page 32.'

#### Tactful tone

'I'm sorry to learn that you had trouble installing the equipment. I think the information on page 32 of the manual may help. If you have further trouble, please don't hesitate to call me.'

## The purpose and format

Does the tone of your document match the purpose and format you are using? If it is conveying an instruction, is the tone polite? Will the readers understand the message because of your tone?

If the readers need to do something after reading your document, the action should be clear to them. A confident tone is suitable if your purpose is to convince someone of a course of action; for example, to:

- attend a meeting
- read a report and review it for management
- make business decisions based on financial spreadsheets
- sign a letter
- follow an instruction.

You would use an appreciative tone when thanking a colleague or client.



## Grammar

Your software program may pick up grammatical errors, but don't just assume the changes suggested are what you want or that all the errors have been picked up.

Check through your work to find errors such as the ones listed below:

### Checking for grammatical errors

1

#### Mixed up tenses – past, present, future mixed in a sentence

For example: Jake went to the office and gets the document. He thought it will be sent by courier.

2

#### Verbs that don't agree with their subjects

For example:

The Board think ...

This should be:

The Board thinks ...

That is because 'Board' is a collective noun. A collective noun is made up of a number of people or things. Other examples are team, group, herd and council.

3

#### Use of 'a' instead of 'an' and vice versa

For example:

He took a apple.

She went to an meeting.

This error sounds obvious, but the problem is that the software spellchecker does not know the difference because both 'a' and 'an' are spelt correctly – so you need to manually check your work for such errors.

4

#### Words that are misused

If you are not sure whether you have used the correct word, look it up in a dictionary. Examples are affect and effect.

Affect is always a verb.

Sally's bad attitude affects her work.

Effect can be a noun.

The effect of Sally's bad attitude on her work is astounding.

Effect can also be a verb. (This is a very formal use of effect.)

Sally's manager will try to effect a better working attitude.

## Sentences

There are four kinds of sentences. Look at the examples for each kind of sentence below. For readability and conciseness, try to use mainly simple and complex sentences; these sentences have one main idea. Compound sentences can become confusing and harder to read. Vary your sentence length but aim for short sentences.

<b>Simple</b>	Simple sentences have one main idea: The book was sent via Express Post.
<b>Compound</b>	Compound sentences have two main ideas. These are joined by a comma or semicolon and a conjunction such as 'and' or 'but'. Here is an example: The book was sent via Express Post, (First idea) but the parcel was sent by courier. (Second idea)
<b>Complex</b>	Complex sentences have one main idea and a second part that explains the idea: The book was sent via Express Post (The idea) because it was urgent. (The explanation)
<b>Compound-complex</b>	Compound-complex sentences have at least two main ideas and at least a second part explaining one of the ideas: The book was sent via Express Post, (The first idea) but the parcel was sent by courier (The second idea) because it was so heavy. (Explanation)

## Summary

1. When you review your document you must check that you have used a suitable tone for your audience.
2. Check that any document has a clear introduction, middle and conclusion, even in short documents such as emails.
3. Check that you have used the essential elements of language correctly. This includes using:
  - active language
  - correct grammatical structures and punctuation
  - accurate spelling
  - concise sentences and paragraphs.
4. When you are writing for on screen, make sure you:
  - use fewer words than you would for print, because most people scan on-screen documents
  - put important information at the top of the page and at the beginning of paragraphs
  - use bulleted lists for easy reading of points.
5. Make sure all your documents comply with organisational requirements such as style guides and templates.
6. Get someone to proofread your documents, because it is difficult to proofread your own writing.