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Answer purpose questions

Effective communication and problem-solving skills are important to help you understand what is required for each document. Developing questions to ask about the purpose, intended audience and timing requirements for each document is one way you can develop these, as well as refining your active listening skills so that you understand the brief clearly. Here are some of the ways to find information.

Answering questions

How you answer the questions relating to purpose depends on your organisation, your job role and how you are initially asked to complete the document. For example, you may be given a clear briefing by your supervisor or manager before you start the document. In this case, you should ask them these questions, and seek their advice on appropriate people to help you, if they do not know the answers.

Deducing answers

You may need to deduce the answers to these questions based on the data you have to include. Clarify your understanding with an appropriate member of your organisation. Review similar documents, or speak with someone who has created similar material. Your colleagues or predecessors in your position may also be able to explain how regularly documents are produced, such as sales reports.

Problem-solving skills

Beyond deducing answers, these may include being responsive to changing requirements or time lines relating to your document, or identifying appropriate solutions when the material you are presenting does not fit exactly with required templates or house style. The more complex a document, the more likely you will need to adopt a problem-solving approach.

Considerations when using email

Remember to consider the file size and type of an attachment before sending it. Make sure your recipient can access the file. It is a good idea to send a separate, confirming email to ensure large files have been received.

Although emails may be more casual than letters, you may be subject to some of the same requirements, such as using a standard layout or font, including marketing messages or a confidentiality clause at the end of the email.

Protecting privacy and maintaining confidentiality

An email displays all recipients in the 'to' and 'cc' fields. If you are copying in your manager, it's more courteous to use the 'cc' field and inform other recipients. If you are sending emails to an external group, such as a customer newsletter, you may use the 'bcc' field to protect your customers' privacy.

Take care when sending confidential information by email, particularly with sensitive business or customer details. For this information, you may need to use encryption or password protection. Follow your organisation's policy on what can be sent.

Manuals, instructions and procedures

Manuals, instructions and procedures may be used to convey information for guiding, educating or training staff. These may be standard work instructions or procedures for a department, such as how to prepare the monthly accounts, or they may be training in specific skills, such as customer-service training. Here you will find information that is relevant to the use of these resources.

Standard work instructions and manuals

Business procedures are sometimes documented to conform to external requirements, such as ISO procedures, and you may be required to follow a template to satisfy audit requirements. This is often the case for manuals about work health and safety (WHS) or equal-opportunity policies.

Training material structure

If you are developing training material, you should confirm whether your organisation has a standard template. This may cover layout and presentation, but may also influence the time allocated to each session before breaks are required and other structural elements.

Website text

Most organisations now display information on their websites. This is a cheap and effective way of communicating to the public. You can upload an existing document, such as an annual report, or you can develop something specifically for the website.

There are specific guidelines which need to be observed for website information, and tender information needs to specify what is required as identified here.

Provider's requirements

If you are developing material specifically for the website, then you should follow the guidelines set by the web provider. Some of these will influence the technical aspects of the document, such as file size, type of graphics and so on. Website text is often quite different in style from other written forms and readers tend to scan material and read on screen, rather than print and read in detail. Other guidelines may influence the actual language, fonts and logos, layout and brand presentation. Websites are an increasingly important aspect of an organisation's image, so it's important to comply with these guidelines.

Tender requirements

Some common guidelines include the following:

- Place critical information near the top of the page.
- Present information in shorter paragraphs than for print materials.
- Present information to minimise scrolling.
- Use a sans serif font in 12-point or larger font size.
- Use bold or italic to highlight key points.
- Use bullet points, lists and graphics to summarise information.

Practice task 2

1. Some organisations have an accepted house style. What is a 'house style'?

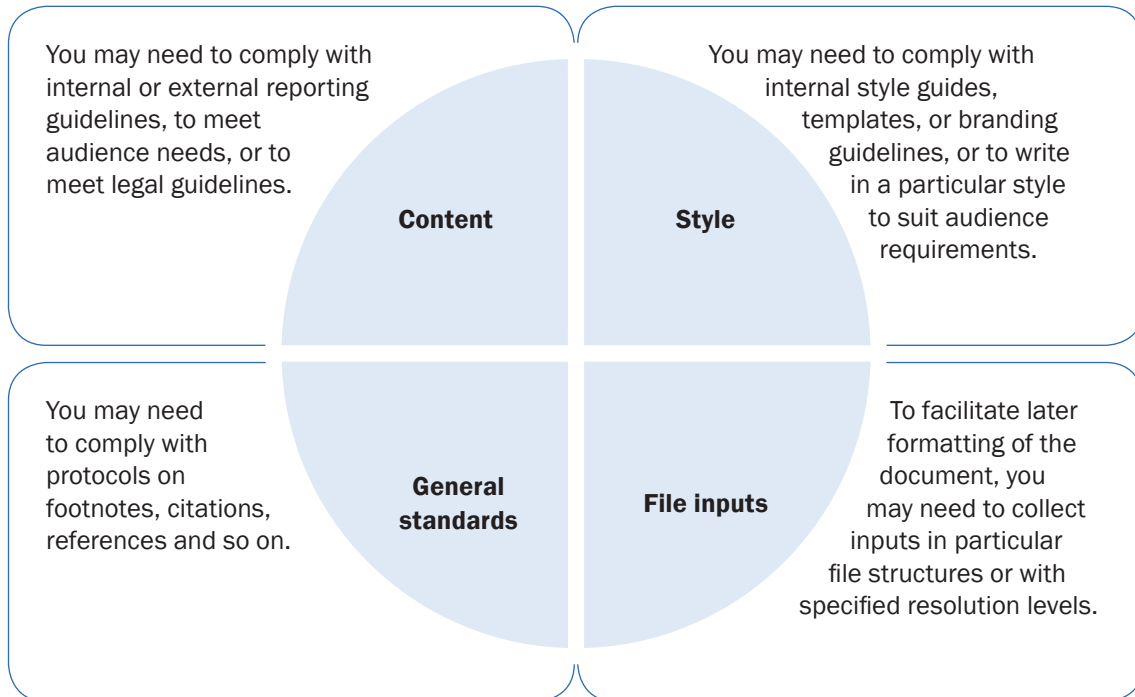
2. To protect the privacy of your clients, would you place their email addresses in the 'cc' or 'bcc' field?

continued ...

1D

Determine document requirements

As part of the document planning, it's important to understand what requirements there may be. Document requirements may include content, style, general standards or file inputs, as described here.



Content requirements

Content requirements can be quite specific. Here is a list explaining some of the requirements you may encounter.

Compliance with genre

Some documents need to comply with general requirements based on what type of document it is. For example, annual reports for large companies generally include a financial summary, financial reports, a letter to shareholders, information on company operations and significant developments, and information about company officers and directors

Reporting requirements

Your organisation may have made some commitments about the type of reporting it will do, perhaps to achieve a certain external certification, or as part of a public commitment. If your organisation is ISO certified, it will need to maintain standards of documentation as part of the certification. Some government contracts require regular milestone reporting, in a specified structure, with which suppliers must comply.

Document extents

Different documents may be subject to word limits. Promotional materials may be limited to a number of pages to minimise printing costs. Some reports or internal documents may have page or word limits, to help with management review, such as requiring single-page summaries as a cover to funding requests with supporting appendices. Submissions for newspapers or magazines are often charged according to word length, so it's important to understand this at the planning stage.



Reference standards

Different disciplines and organisations can have quite specific requirements for referencing other work. Since these may be very specific, it's important to verify at planning stage what information you should record when collecting inputs for your document.

Plagiarism is using someone else's work without acknowledgment and presenting it as your own. Consequences can range from discrediting academic work to copyright concerns. Acknowledge any material you use in your document. You should be familiar with common methods of creating a bibliography, footnotes and endnotes, particularly if you prepare formal, detailed research reports. The difference between different ways of acknowledging your sources of information is here.

Bibliographies

Bibliographies provide a list of the references used throughout the document. The Harvard (author-date) and the Oxford system are commonly used methods.

Citations

Citations are short details about the reference used within the text of a document. Full details of the reference are included in the bibliography.

Footnotes

Footnotes and endnotes are used to either provide further information, such as legal disclaimers, or to provide bibliographical information. Footnotes are located at the bottom of each page, while endnotes may be included at the end of each chapter, or the whole document.

Acknowledgments

Acknowledgments are used to recognise particular contributions by individuals and organisations. These are usually placed at the start of a document.

Presenting options

Arguments and rebuttals can also be used when presenting a proposal with several options. A simple method is to create a list of options in a table, with columns 'For' and 'Against'. This allows the reader to assess the worth of each option.

Persuading the reader

If you are presenting a series of views, but hoping to persuade the reader to support one particular view, it's best to present the alternative views first, together with their rebuttals, and conclude with your preferred view.

Different sequences

Some documents may adopt a more fixed structure. Documents may have chronological, alphabetical or operating sequences, as shown here.

Chronological

Some reports may use a chronological sequence, either throughout the document or in key sections. A research report may begin with a summary of the research, key findings, and methodology, then proceed to a chronological reporting of the research, then finish with conclusions and recommendations.

Alphabetical

Alphabetical sequences may be used for documents that have a reference function, as information is easy to find. Training manuals or reference documents for new employees about different forms used in the organisation may follow this structure.

Operating

Documents for work instructions and procedures will most likely adopt an operating sequence; that is, they will mostly follow the order used in the procedure, with preliminary sections explaining the purpose of the document, key terms, related documents and so on.

Using plain English

Using simple English will help improve the readability of your document. Some common guidelines for using simple English include the following:

- Use active language rather than passive language.
- Use inclusive language and avoid discriminatory language.
- Use short sentences with one main point.
- Vary sentence and paragraph length.
- Avoid repeating content unnecessarily.

Formatting and document appearance

Depending on your organisation's structure and procedures, you may not be responsible for formatting the final document. If someone else will format the document, then you should ensure that they are aware of any organisation requirements, such as those contained in the style guide or any other workplace policy or procedure.

If you are responsible for formatting the document, you should be guided by the organisation requirements or the style guide. If there are no guidelines in place, then spend some planning time considering your format so you can use it consistently throughout your document.

Some elements to consider include:

- font styles for standard text, headings, subheadings, emphasising text, creating case studies, introducing new terms and so on
- headers and footers including document references, logos, copyright messages and so on
- labelling of graphics and other illustrations
- spacing between paragraphs, lists and sections to provide white space
- use of borders, break-out boxes and other emphasising tools.

Document templates and styles

Many organisations develop document templates that are used as a standard for all written texts (for example, letters, reports, emails). The templates contain prescribed styles, which are applied to the features of a text document. Often, the styles are set up with corporate colours and are designed to create a consistent overall presentation for all communications. Styles not only determine the font type and size, but are also formatted to include space before and after, indents, bullets and numbering attributes for each feature.

In addition to having consistent styles, the use of templates with prescribed margin sizes and spaces between the paragraphs determines the amount of white space that in turn enhances the readability of the document.

... continued

2. Identify two sustainability strategies to ensure the effective use of resources in your organisation or in one with which you are familiar.

Summary

1. Writers should determine the purpose of a complex document by clarifying the audience, the presentation forum, the expected outcome and the expected length of the document.
2. There are many different document formats, including detailed business letters, emails, instructional material, promotional material, reports, speeches, presentations, tender submissions, public notices and website text.
3. Each document format may have different requirements about their content, style, or general standards such as referencing and cataloguing. Your organisation may detail specific requirements in a style guide, which you should follow carefully.
4. Research file input requirements carefully during the planning phase to ensure you provide documents in the appropriate format.
5. Document structure should be appropriate to the type of document and the presentation forum.
6. A control document is a helpful way of planning structure and content of your document.

Example: prepare text for submission

Simon has received the recommended pricing structure from the finance department. He develops a table summarising the price by model line, and for the different alternative uniforms they are offering. After checking that the table covers all information Natalie requested, he includes it in his control document. Since pricing is a critical decision, he forwards this table to Jesse for review and approval before he completes the document. Here are the steps taken within this process.

Supporting his case

To support the case that his company is a supplier of choice, Simon is collating information about their customer satisfaction performance compared to industry standards. He reviews the latest customer satisfaction results, as well as their performance figures, and makes some notes about how this reflects their superior performance. He sketches some column graphs to present the information. Having clarified the graph structure in his mind, he creates the graph in Microsoft Excel.

Reviewing information

It's prudent that Simon asks his manager to review pricing ahead of the whole document, as it could take time to resolve any concerns with the finance department, and he has a fixed deadline for submission. Interpreting customer satisfaction and performance information allows Simon to choose which elements to highlight in his graphics, while sketching a graph before creating it can save time in structuring data to create a graph in applications such as Microsoft Excel.

Practice task 8

Place a number in the column next to each step in **the following table** to indicate the order of steps you would follow when preparing text.

Steps in preparing text	Correct order for each step
Review information	
Write brief notes	
Interpret data	
Develop graphics	

2D

Identify and fill information gaps

Review your control document and assess whether you have everything you require. You may find that, even though you have received all the inputs you requested, there are still some gaps in the information. For example, you may be developing a proposal for management approval for a new piece of equipment. After reviewing your control document, you may decide that there is insufficient information on the inefficiency of using an outdated photocopier that regularly jams, and decide to include an estimate of time lost per week.

You may find that some of the material you requested from other employees is still pending. You should remind these employees of your request, perhaps providing information about when your document is due and how their delay is putting your document at risk.



Request information

Requesting information from others can be tricky, depending on your relative position and influence in the organisation. If you are meeting resistance from your peers, you may need to speak to the appropriate manager or supervisor for assistance. It's courteous to inform someone's manager if you have asked them to complete a large piece of work.

In most organisations, there are a range of people you could ask for information, some of whom are outlined here.

Colleagues or team members

Usually within your own area, and can be approached directly. May have more information or experience, better data presentation skills, or some time available to assist you.

Consultative committees

Consultative committees may be helpful for understanding background to a policy or direction for a document.

Internal specialists

Internal specialists may be helpful for understanding background to a policy or direction for a document.

continued ...

2F

Use appropriate language

Using appropriate language is critical to an effective document. If the language is too technical or fails to convey information in a meaningful way, the audience will not understand the message, and therefore the document cannot achieve its purpose.

Most readers in a business environment do not have time to read over a document several times to understand its key messages. You must use clear, concise language that is appropriate to the education and knowledge level of the audience. This way, the audience will absorb your message easily, making your document more effective.



Ways to use appropriate language

Some suggestions for using appropriate language are outlined in the following. You should also review and comply with your organisation's style guide.

Minimise technical language

It may not be possible to avoid technical language, but ensure it is used at a level that would be easily understood by the audience. If in doubt, define terms carefully when they are first introduced. You may need to repeat this in longer documents, depending on how frequently the terms are used.

Minimise jargon

Many organisations use unique jargon, abbreviations and acronyms. While these may be in common use within the organisation, defining them when they are first used, and using simple English alternatives where possible will help avoid confusion for new employees or other readers unfamiliar with the terms.

Use active voice

Previous sections have explained how active voice is generally more concise, and easier for readers to understand. Passive voice often requires a more complex sentence structure, which can confuse the message.

Selective use of passive

Traditionally, passive writing was used for formality in business writing, but this trend is declining. Passive voice can be a helpful tool when the writer is deliberately obscuring the subject, such as 'The error was overlooked in the editing process' rather than 'The editor overlooked the error'.

3A

Review draft text

It's important to complete the review stages carefully, as errors can distract readers from an otherwise excellent document. It's likely you'll complete several reviews of your document, as you process amendments, finalise small details and check the overall functionality of your document. The following checklist summarises the key areas you should review.

Review checklist	Yes	No
Does it achieve the document purpose?		
Does it use language appropriate to the audience?		
Does the format suit the intended presentation forum?		
Does it conform to length requirements?		
Have you used the required templates (either internal or external)?		
Have you conformed to any relevant style guide requirements?		
Have you met any traditional requirements for this document type?		
Have you used a simple, effective writing style with: <ul style="list-style-type: none"> • active, inclusive, non-discriminatory language • clear, concise sentences of varied length • a high level of readability? 		
Have you met referencing standards; for example, bibliography, citations, footnotes, acknowledgments?		
Are your files an appropriate size and type for your chosen format?		
Is the overall content appropriate to the audience's knowledge and skill level?		
Is there a balance of information and examples?		
Are graphics clear, effective and appropriately balanced with the text?		
Is there sufficient information to achieve the document's purpose?		
Is information provided throughout the document consistent?		
Have you checked for spelling, grammar and style errors?		
Have you completed internal reviews, especially legal reviews?		
Have you processed any amendments from the reviews?		
Have you reviewed formatting for consistency and a balance of white space?		
Have you requested proofreading by a colleague or associate?		

Punctuation

Correct punctuation improves a document's readability. The following forms of punctuation should be correctly and consistently used in accordance with the specifications in the above style manual:

- Apostrophes, brackets, colons and semicolons
- Full stops (in sentences and in abbreviations) and spacing after full stops
- Commas, hyphens and quotation marks

Your organisation's style guide may provide guidance for using punctuation correctly. Some software packages will do grammar checks, which are useful to identify some errors.

Spelling

At a minimum, you should run a spellcheck on any document before you distribute it, even for preliminary review. Check which dictionary is set in your word processing application, as some organisations have a preference for UK spelling over US spelling; for example, using 'organisation' instead of 'organization'.

If you are in doubt, consult a dictionary, such as the Macquarie Dictionary or the Australian Oxford Dictionary.

There are some spelling errors that may not be identified by automatic spellchecks. For example, you may type 'form' instead of 'from'. Some of these errors may be identified in the grammar checks, but others will not, so review your document carefully for these types of hidden errors.

Style

Make sure the text has the appropriate style and a consistent tone. If you have changed contributors' text, make sure you check them to review to ensure you have not changed the meaning, particularly for technical material. Read sections of it out loud to yourself. Does it flow easily? Does it seem to take too long to read some sentences, or are you running out of breath? If so, you may find that you need additional punctuation in your sentences, or to write shorter sentences. You should also check your document against any organisational style guide requirements.

3D Incorporate revisions

It's likely that the approvals process will generate suggestions and changes for your document. When you receive the suggestions from the reviewer, ask them whether they wish to see the document again once the changes have been made, or whether they are happy to proceed without further review. If you are using a sign-off sheet, ask them to sign this accordingly.

Some of the common changes that may be required are outlined in the following.

Content

Changes can potentially be quite time-consuming to make. For example, a reviewer might suggest that your sales report include a graph comparing sales figures across years. You will need to collect this information, create the graph, and insert it into your document with supporting text. Reviewers may also suggest removing certain content to maintain confidentiality or to ensure relevancy to the main purpose of the document. Presentations and speeches may require substantial change, as the presenter needs to be comfortable with the content they are delivering.

Formatting and layout

These changes will be relatively straightforward to make, although they can still be time-consuming. Be aware that when external printers and publishers are involved, preparing multiple proof copies can become expensive. Ensure that you circulate the proofs to all affected stakeholders before returning them to the printer. When providing or receiving input about formatting and layout changes, discuss the changes in person or over the phone, rather than simply returning a marked-up document. This helps ensure the correct change is made the first time, saving time and money.

Legal compliance

Some legal input may be non-negotiable. Experts may require wording to be changed to ensure compliance with particular legislation. Other legal guidance is more general, and may relate to minimising risk. While you may choose not to input these kinds of changes, you should ensure that your manager and other affected stakeholders are aware of the decision. It's also prudent to keep a record of their approval not to include these types of changes.

4A

Choose appropriate design elements

Depending on your job role and your organisation's structure, you may either format the document yourself, or pass it to a formatter. Some elements of formatting may be dictated by your organisation style guide or templates.

Consider formatting requirements in your planning stages, particularly if you are developing a template. This can save you considerable time when the document is complete. If you are developing your own template, consider writing a list of when particular elements will apply to help you check consistency in the proofreading stages.

In general, the design and layout needs to reflect the nature of your document, its overall style and tone. You may use a more traditional, symmetrical layout with conservative textual contrast for a management report, but adopt a more light-hearted, colourful approach for an employee presentation.



Capital letters and acronyms

It is not a good idea to capitalise words as a design feature in professional documents such as letters and reports. However, if you opt to use capitals, make sure you use them consistently throughout your document. Some words always have a capital letter, such as first words of sentences, proper nouns like Australia and acronyms such as ANZ (Australia New Zealand).

Fonts

Fonts can provide contrast in a number of ways, as outlined here.

Size

- Vary text size based on the relative importance of the text.
- Headings will usually use the largest text, followed by subheadings, body text then captions.
- For body text, try to use at least 10-point serif font to improve readability.

Weight

- Most fonts can be portrayed in different weights, such as bold, italic, underline or combinations such as bold-italic.
- These add interest, as well as providing cues for items like headings, introducing new terms and referring to titles.
- Plan their use carefully and apply consistently.

Tables

- Tables can help summarise key information in a document.
- If tables will be cross-referenced throughout the document, or if a list of tables will be included with the contents, then number tables so they are consistent with the heading hierarchy. A simple method is to use the chapter numbers, such as 'Table 4.1: Common design elements'.
- The font for labelling tables is usually the same, but smaller than that used for the main body of text.
- A table must always be cross-referenced to the content of the document to ensure the reader links the two.

Page size and layout

There are a number of considerations when it comes to page size and layout. The orientation of the page is often determined by the purpose of the document and what it is intended to contain (for example, some tables present better in a landscape layout). Margins and indentations dictate how much white space is included in a document, and this can affect its readability. Here are some aspects of page size and layout that you need to consider.

Margins and paragraph indentation

Margins should provide balance between left and right margins, and top and bottom margins. Consider extending top and bottom margins if the headers and footers are detailed. Adjusting margins can help include more text if there are page length limitations, but if they are too narrow then a document is difficult to read.

Indenting paragraphs can help highlight text. Lists and bullets should be indented by at least one level from the main text to create contrast. Break-out boxes or side panels can be a helpful tool for providing related information that does not flow easily from the main text. Break-out boxes may be used in training material to provide practical tips on applying the theory being described.

Page orientation

Portrait and landscape are the most commonly used orientations in complex documents. You can switch between the two formats within a document; for example, displaying the main text in portrait format but including a table summarising product in landscape format.

Presentations often have a number of slide templates that can adjust the orientation of a page; for example, different ways of combining text and graphics. Microsoft PowerPoint has a slide-master function, which allows you to create a template for background colour, font style and so on for each of these slide types. Similarly, desktop publishing applications may have more formats to better suit newsletters or promotional materials.

Example: choose appropriate design elements

Simon is formatting the presentation for Jesse to deliver to the automotive repair chain. Here is how Simon selected appropriate design elements for his submission.

Adapting the format

Simon decides to use his organisation's corporate colours as a guide for his presentation. Since there is no standard template, he designs one himself so he can use it again for subsequent presentations.

He decides that he will display their logo on the bottom right-hand corner of each slide. On the left-hand corner of the slide template, he includes the date of the presentation. Since the logo is dark blue with silver edging, he decides to make the background of the slides blue, and to use yellow font so it can be clearly distinguished on the screen.

Creating links

For slides with graphics, Simon displays text on the left-hand side, with the graphic on the right. He realises the slides with pie charts are more effectively displayed with the text on top, but retains the other format for the column graphs and photographs.

Simon has structured the written submission with numbered heading hierarchies. Since there is some introductory company information in the presentation, he can't use the same section numbers, but decides to use the same headings in her presentation.

Consistency

Confirm that language is used consistently. If you have been following a style guide for spelling, capitalisation and other language points, then check that all language follows this guide. Other elements that may be affected include hyphenation, abbreviations, choice of US or UK spelling, and overall style and tone.

Finally, check that the formatting has been applied consistently throughout the document. Have you applied heading hierarchies consistently? Is there a consistent use of white space? Are lists and tables formatted similarly? These types of checks will help ensure your layout looks professional and will ensure the reader is not confused or distracted by inconsistencies.

References

Check cross-references, such as 'Table 1.3 shows...'. If you have used automatic links for cross-references, refresh the links before completing these checks. You should refresh these links whenever you make a change to a label or cross-reference. Check that any web links are still current.

If a particular style of referencing, such as the Harvard style, is required, check that all references follow this style; otherwise, check the same style has been applied consistently. Make sure sources have been acknowledged and that any copyright requirements have been followed.

Document completeness

Depending on the nature of your document, you may require supporting sections, including:

- covers and text for covers
- executive summary
- footnotes and endnotes
- appendices
- lists of abbreviations, key terms or a glossary
- references or bibliography
- index or table of contents
- copyright or library classification data.

Section completeness

It's often easier to compile sections when the main body of the text is complete, so ensure that you allow enough time to prepare and review these documents. Ensure information in these supporting sections is consistent with the main body of the text, in terms of presenting the same data, following the same style guidelines and a similar format. Spot check the information in reference documents against the main body of the text.

Check the executive summary very carefully. Some members of the audience may read this but only scan other material. Errors in could therefore have a significant impact on these readers.