Business Writing

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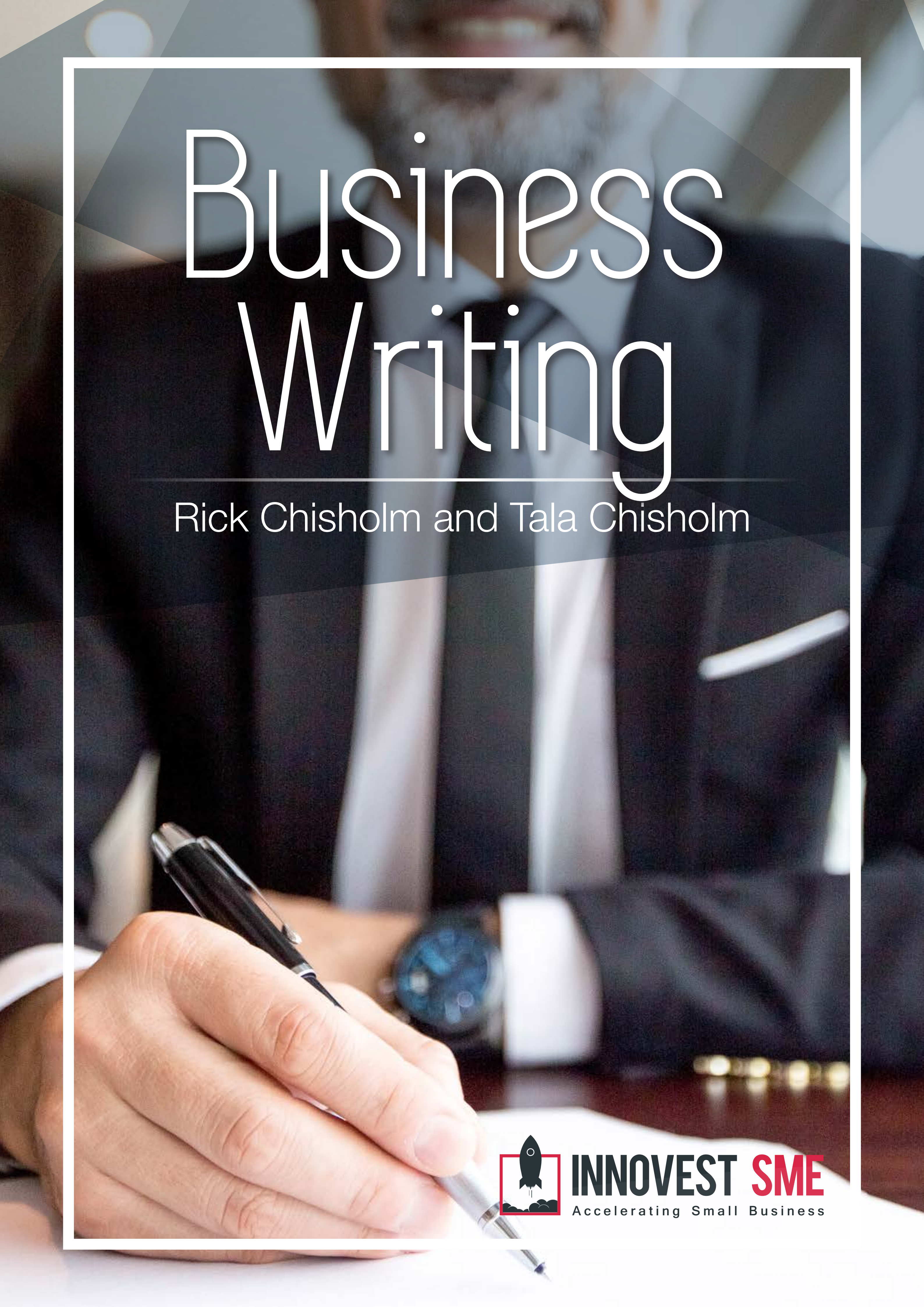

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Your business writing can serve as persuasive evidence of your competence, your personality, your management style.

Wilma Davidson

PREFACE

Writing is a key method of communication for most people, and it's one that many people struggle with. This book will give you a refresher on basic writing concepts such as spelling, grammar, and punctuation. It will also provide an overview of the most common business documents such as proposals, reports, and agendas.

When all other means
of communication fail,
try words.

Anonymous

CHAPTER ONE

WORKING WITH WORDS

The building blocks of any writing, whether for business or social purposes, are words. Failure to use words properly can affect the over-all impact of your prose. In this chapter we will discuss the spelling of words, grammar issues in writing, and how to prevent both by creating a cheat sheet.

SPELLING

The use of correctly spelled words is important in all business writing because you are presenting a professional document. A mis-spelled word can reflect negatively on your image. It may also result in confusion in meaning.

Here are some tips to improve spelling issues when writing:

1. Familiarize yourself with commonly misused words, particularly sets of words often mistaken for each other.

   Example: *Affect* vs. *Effect*

   Affect is to influence or change. (Our income has been affected by the global recession.)

Effect is the impression, result. It can also mean ‘to cause’. (The global recession has a dramatic effect on our income.)

This problem also happens with pronouns or pronoun-linking verb contractions which sound alike. Examples: *who’s* vs. *whose*, *their* vs. *they’re* and *your* vs. *you’re*.

2. Make sure you pronounce words properly. Colloquial pronunciations can cause people to omit certain letters in writing. Example: writing ‘*diffrence*’ instead of ‘*difference*’ because one pronounces this word with a silent first e.
3. Note some friendly rules on spelling. Example: *i* before *e,* except after *c* (e.g. receive, belief)
4. If you’re writing for an international audience, note that there are acceptable spelling variations in the different kinds of English. For example, American and British English tend to have many differences in the spelling of the same words. Notable are the use of -*ou* instead of –*o*, as in *colour* vs. *color*; *-re* instead of –*er*, as in *centre* vs. *center*; *-ise* instead of –*ize*, as in *realise* vs. *realize*.
5. Lastly, use spelling resources! These days, spell checking is as easy as running a spell check command on your word processing software. If you’re still uncertain after an electronic spell check, consult a dictionary.

GRAMMAR

Grammar details rules of language syntax. Like spelling issues, grammar violations in a business document can reflect negatively on a professional or a company. Care should be given that all business documents are grammatically correct.

Here are two grammar issues most business writers have trouble with.

NOTE: All grammatical rules discussed here have exceptions and complex forms.

1. **Subject-verb agreement**: Singular subjects go with singular verbs, and plural subjects go with plural verbs. The singular form of most subjects contains the suffix *–s* or *–es*. The opposite is true for verbs; it's the singular verbs that end with *–s*.

   Note though that some subjects have unusual plural forms (e.g. *medium- media, man-men*, etc.)

2. **Verb tenses**: Modern English has six tenses, each of which has a corresponding continuous tense. The first three: present, past and future are less problematic.

   The other three tenses, perfect**,** past perfect, and future perfect**,** are formed with the helping verbs *have, has*, and *had*.

   Perfect tense is used to express an event that happened in the past, but still has an effect on the present. Example: Mr. Michael Johnson *has managed* this company for the past 5 years.

Past perfect tense is used to express an event that took place before another action, also in the past. Example: Mr. Myers *had been sitting* on a meeting when the client called.

Future perfect tense is used to express an event that will have taken place at some time in the future. Example: I will *have finished* by 10pm.

In business writing, there are standard tenses used depending on the type of document you are writing. Business cases (to be discussed in a later Chapter) may be written in past or future tense depending on whether the purpose is to discuss how a project was executed, or propose how it would be executed.

Verb tenses can also vary within the same business document. The Organization Overview section of a proposal may be written in perfect tense, while the Financial Projection Section written in present tense.

CREATING A CHEAT SHEET

The number of spelling and grammar rules can feel daunting, but you don't have to memorize everything. What you can do is create a cheat sheet.

A cheat sheet is a ready reference of rules you need to remember, written in a brief, simple and easy to understand fashion. Tables and bullet points can make a cheat sheet more effective. Some cheat sheets are poems, alliterations, and songs.

For best results, make your cheat sheets personalized, targeted to spelling and grammar issues that you often have problems with.

The following is a sample template for a cheat sheet:

Issue	Rule	Example

Here is a sample accomplished cheat sheet:

Issue	Rule	Example
Its vs. It's	'Its' is the possessive, third person, singular adjective, typically referring to something other than a person. 'It's', short for 'It is', refers to something that 'it' possesses.	The machine spread its claws. It's the fastest engine for this job.

PRACTICAL ILLUSTRATION

Jacob was preparing to write an important paper for one of his partners. He worked hard on it, and after he was done, he asked his colleague to review the text after he had run spell check. Upon close inspection, the colleague found some errors and discussed them with Jacob. One was spelling. Although spell check caught most of the errors, it missed many that had to do with context, such as “its” and “it’s”. Some of his sentences had verb tense errors and such that were not picked up by spell check. After he had checked the document over well, the colleague made some cheat sheets for Jacob to help him remember the rules he neglected to address. Jacob was able to improve after that.

Have something to say, and say it as clearly as you can. That is the only secret of style.

MATTHEW ARNOLD

CHAPTER TWO

CONSTRUCTING SENTENCES

Now that we have a basic understanding of how to use words more effectively in business writing, it's time to look at sentences. This chapter will discuss the parts of a sentence, its proper punctuation, and the four kinds of sentences.

PARTS OF A SENTENCE

A complete sentence has two parts: a **subject** and a **predicate**.

The subject is what the sentence is about. It is usually a noun or pronoun. The predicate tells something about the subject. It is often indicated by an action verb or a linking verb.

Example:

"The committee recommends a full inquiry over this matter."

The **subject** is 'The committee' and the **predicate** is 'recommends a full inquiry over this matter.'

Subjects and predicate can be simple and complex, so length does not determine what a subject and a predicate is.

Complete sentences are advisable in business writing. Aside from subscribing to the more formal format typical in most business document, complete sentences are what make sense.

PUNCTUATION

Punctuations are standard marks in writing used to separate words, clauses, and sentences. The use of punctuations can affect a text's readability, flow, and even meaning.

Commonly used punctuations include:

- **Period** (.) – used to end a sentence, indicating a full stop. Periods are also used after initials and abbreviations.
- **Question Mark** (?) – used after a question.
- **Exclamation Point** (!) – used after statements expressed with strong emotion.
- **Comma** (,) – used to separate items in a series. Also used before and, but, or, nor, for, so, and yet, when they join independent clauses (unless the clauses are short). It is also used to separate items that interrupt a series.
- **Colon** (:) – used to mean "note what follows," and is typically succeeded by an elaboration, summation, interpretation of what it precedes.
- **Apostrophe** (') – used to show belonging or to indicate the omission of letters in a word.

- **Semicolon** (;) - used to link independent clauses not joined by a coordinating conjunction. As a rule, use a semicolon to end complete sentences in cases where you're not indicating a full stop.

TYPES OF SENTENCES

Four Kinds of Sentences:

1. **Declarative:** The most commonly used sentence type in business writing, these are sentences that make a statement. They end with a period.

   Example: We are writing to inform you that your account would be expiring in ten days.

2. **Interrogative:** These are sentences that ask a question. They end in a question mark. Interrogative questions don't necessarily follow the format of subject + predicate.

   Example: Would you be renewing your account this year?

3. **Imperative:** These are sentences that give a command or make a request. They usually end with a period, though sometimes they can end with an exclamation point (although to do so is not recommended in business writing).

   Imperative sentences are advisable when you're making a 'to-do' list, creating an agenda or are outlining an instructional manual.

Example: Please inform Joseph that we would be expecting his payment on Monday.

5. **Exclamatory:** These are sentences that express strong feeling. They usually end with an exclamation mark.

   Example: Congratulations for getting promoted to Vice-President!

PRACTICAL ILLUSTRATION

Carter was trying to write a letter to a colleague expressing his gratitude for a job well done, but couldn't find the words to express himself. He knew what he wanted to say, but his sentences didn't seem to flow correctly. He decided to break down his sentences into simpler parts so he could determine what was the matter. When he did that, he found he could make them more interesting and smooth by adding punctuation. His sentences could even cause the reader to use inflections in their own voice when reading! Now he has a top notch letter that his colleague is sure to love!

Clutter is the disease of American writing. We are a society strangling with unnecessary words, circular constructions, pompous frills and meaningless jargons.

WILLIAM ZINSSER

CHAPTER THREE

CREATING PARAGRAPHS

Carefully written words and well-constructed sentences make up the building blocks of writing. Now it's time to discuss how you can put these blocks together for best results. In this chapter, we will discuss the basic parts of paragraphs and some tips on organizing your paragraphs.

THE BASIC PARTS

The 3 Basic Parts of a Paragraph:

1. **Topic Sentence:** The topic sentence is the first sentence in a paragraph. It introduces the main idea of the entire paragraph. It is also called the 'controlling sentence' because it gives the writer direction on where the discussion within that paragraph should go.

2. **Supporting Sentence:** Supporting sentence(s) expand your topic sentence. They comprise the main body of your paragraph. There can be more than one supporting sentence in a paragraph, and they should be arranged in the best logical order.

3. **Closing Sentence:** The closing sentence is the last sentence in a paragraph. It reminds the reader what the paragraph is all about,

often by restating the main idea behind the entire discussion or offering a conclusion. The closing sentence is like a 'clincher' statement.

Understanding the three basic parts of a paragraph ensures that your writing is clear and focused.

Note that not all paragraphs have to contain these three basic parts, but these parts serve as a good guideline in creating cohesive paragraphs.

ORGANIZATION METHODS

The following are some tips in organizing your paragraphs:

- **Keep your main idea central**. Before you begin writing any business document, you have a central idea that you wish to impart. If you're writing a proposal, for example, your main idea might be that 'this solution is what would solve the problem most satisfactorily.' Keep this idea in mind, and weed out information that does not support your main idea.
- **Decide how to best explain your main idea**. Once you have a main idea, decide what facts or topics best supports your idea. Present them in logical order.
- **Whenever possible, outline first before starting on any writing**. It will give you an idea of how the topic will play out.

Below is an example of an outline:

Main Idea:

A. Supporting Idea 1.
    1. Supporting detail for Idea 1
    2. Supporting detail for Idea 1
    3. Supporting detail for Idea 1

B. Supporting Idea 2.
    1. Supporting detail for Idea 2
    2. Supporting detail for Idea 2
    3. Supporting detail for Idea 2

C. Supporting Idea 3.
    1. Supporting detail for Idea 3
    2. Supporting detail for Idea 3
    3. Supporting detail for Idea 3

PRACTICAL ILLUSTRATION

Karen needed a detailed and thorough paper on the current business plan. She needed to organize her paragraphs so that she could better express the ideas in her writing. She started by making an outline or her paper. This allowed her to see a sort of map of her ideas so that she could have them organized as a whole. Then she made each paragraph make more sense and added to their readability by organizing the sentences into the topic sentence, the supporting sentences, and the closing sentences. When she stepped back and took a look at her work, it was exactly as she wanted it.

Organizing is what you do before you do something, so that when you do it, it's not all mixed up.

A. A. Milne

CHAPTER FOUR

WRITING MEETING AGENDAS

Time is a precious commodity in business; you cannot afford to have discussions go all over the place. This is why agendas are an integral part in keeping meetings focused, organized, and flowing well. In this chapter, we will discuss the basic structure of agendas, how to select an agenda format and tips and techniques when writing an agenda.

THE BASIC STRUCTURE

An agenda is a list of the topics for discussion in a meeting, alongside with details that can help the meeting run successfully. It keeps the discussion on track and the meeting within schedule. When included in the invitation, an agenda is a way to brief participants on how they should prepare for the meeting and what they should bring.

The basic structure of an agenda includes:

- Date, Time, Location, and Estimated Duration of the Meeting
- Purpose of the Meeting
- Advanced Preparation Guidelines

List down what invitees need to review or think about before the meeting so that the discussion can be more targeted and productive. This is also the section to advise attendees what they need to bring to the meeting. Example: “Please have a copy of the 2005 Financial Report with you.”

- List of Invited (or Confirmed) Attendees
- Items for Discussion

It is recommended that you state items for discussion using results-oriented action words. Example: “Decide on which vendor to award Sunrise account to.” is a better agenda item than “Sunrise Account” or “Talk about Sunrise bidders.”

- Person-in-Charge for each item
- Approximate Time to be spent on each item

Below is a sample template for a meeting agenda:

<table>
<tr><th colspan="3">AGENDA
TITLE OF THE MEETING
ORGANIZATION NAME</th></tr>
<tr><td colspan="2">Date:
Time:
Place:
Ending Time:</td><td>Estimated Start

Estimated</td></tr>
<tr><td colspan="3">Purpose of the Meeting:</td></tr>
<tr><td colspan="2">Invited (or Confirmed) Attendees:
1.
2.
3..</td><td>
4.
5.
6.</td></tr>
<tr><td colspan="3">Advanced Preparation Reminders:</td></tr>
<tr><td>Item</td><td>Person–in-Charge</td><td>Estimated Duration</td></tr>
<tr><td>1.</td><td></td><td></td></tr>
<tr><td>2.</td><td></td><td></td></tr>
<tr><td>3.</td><td></td><td></td></tr>
<tr><td>4.</td><td></td><td></td></tr>
<tr><td>5.</td><td></td><td></td></tr>
<tr><td>6.</td><td></td><td></td></tr>
<tr><td>7.</td><td></td><td></td></tr>
</table>

Below is an excerpt from a meeting agenda:

<table>
<tr><th colspan="3">AGENDA
MEETING ON IMPROVING EMPLOYEE RETENTION FOR 2010
SMITH SALES AND MARKETING CORPORATION</th></tr>
<tr><td colspan="2">Date: July 14, 2009
Time: 04:00 pm
Place: ABC Conference Hall
Ending Time: 05:00 pm</td><td>Estimated Start

Estimated</td></tr>
<tr><td colspan="3">Purpose of the Meeting:
a. To present the highlights of the ‘Survey on Employee Loyalty and Commitment’ conducted last month.
b. To draft an action plan based on the results of the survey.</td></tr>
<tr><td colspan="2">Invited Attendees:

1. Mark Spencer (MS)
2. Louis Walsh (LW)
3. Joseph Barlow (JB)</td><td>4. Victoria Teasdale (VT)
5. Mary Beth Cole (MBC)
6. Howard Donald (HD)</td></tr>
<tr><td colspan="3">Advanced Preparation Reminders:

Please review the results of the ‘Survey on Employee Loyalty and Commitment’ sent to you via email last Friday. Also, please come up with suggestions on how we can incorporate insights from the survey into next year’s Employee Retention Program</td></tr>
<tr><td>Item</td><td>Person–in-Charge</td><td>Estimated Duration</td></tr>
<tr><td>1. Present the highlights of the survey results.</td><td>VT</td><td>10 minutes</td></tr>
<tr><td>2. Discuss the implications of the results.</td><td>LW</td><td>15 minutes</td></tr>
<tr><td></td><td></td><td></td></tr>
</table>

CHOOSING A FORMAT

There are many different formats of a meeting agenda, although very few stray from the basic structure discussed earlier. Word processing software, like Microsoft Word, offers agenda templates and agenda wizards for you to use.

The agenda format to use depends on:

When the attendees are going to view the agenda: Most agendas are distributed days before the meeting (which is recommended). There are cases, however, when an emergency meeting has to be called, and the agenda is sent on the meeting day/ hour itself. If it's the latter case, write the agenda in outline form; this way it can be easily reviewed in the shortest time.

The context of the meeting: Some meetings happen regularly, for example a monthly Board of Directors Meeting. In this case, sections on 'Matters Resolved the Previous Meeting" or "Matters Arising from the Previous Meeting" may be appropriate for the meetings to have a good flow.

Agendas for meetings that happen regularly may not be as detailed as other agendas, as there is the presumption that regular attendees can easily make out what basic outlines and basic tags mean. The attendees' level of familiarity with the items in the agenda can also dictate how detailed and how formal an agenda should be.

The purpose of the agenda: Your purpose in sending out an agenda can influence what format you should use.

Some agendas are meant as an invitation to potential meeting attendees. In this case you can include sections on how you perceive their input on the discussion would help.

Some agendas are meant as orientations. For example, The Toastmasters' Club issue agendas to inform their invitees what would happen in an event. They write the agenda in the second person, e.g. "This is the section where you discuss what happened in the last symposium…"

WRITING THE AGENDA

When writing the agenda, consider the following factors:

- **Priority of Items**
    - Consult everyone involved in the meeting what topics should be included in the agenda. At least, seek confirmation from your team if the agenda is accurate and complete.
    - Rank the topics in descending order of importance and urgency. This way, it's the less priority topics that get sacrificed in case there's no more time.
- **Logical Flow**
    - Start with topics arising from the previous meeting before new stuff, unless new issues are more important.
    - Combine items that are related and or similar.

- Start with ‘informational items’ first, before items that require critical thinking and decision-making.
- Allot time for questions.
- Close with a wrap-up session.

- **Timing**
  - Plan for only 30 minutes to 1 hour and 30 minutes. Anything longer tends to be unproductive because of attendees’ fatigue.
  - Be reasonable in setting the time that will spent on each topic. If the discussion has to be really focused, state in the agenda what precisely would be discussed. You may also advise attendees what they need to prepare beforehand to get the discussion flowing faster.

PRACTICAL ILLUSTRATION

Jenny was preparing for an upcoming meeting, and so she decided to create an agenda. She wanted to include details about what the meeting was for, what the attendees might need to bring, and when the meeting should end. She made sure to keep her thoughts logical and brief, but also actionable, so that they contribute to the flow of the meeting rather than clutter it with unnecessary ideas or suggestions. She also made sure to give enough time for each subject to be discussed thoroughly so that her approximation of the end time of the meeting would be more accurate. When the meeting came to pass, it ran smoothly, all because she made sure everyone was prepared.

Almost overnight the internet has gone from a technical wonder to a business must.

Bill Schrader

CHAPTER FIVE

WRITING E-MAILS

Email is a convenient and effective medium to conduct business communication. In this chapter we will discuss etiquette guidelines on how to address an email message, as well as grammar and acronyms rules in the letter body.

ADDRESSING YOUR MESSAGE

When addressing an email, it's important to know the difference among the To, Cc and Bcc fields.

- **Using the 'To' field**: The 'To' field is used when sending a direct message to someone.

  You may send the same email to multiple addresses using the 'To' field. Do so when your email is meant to be addressed directly to all recipients, as in the case of a manager directing his team.

  Note though that when you use the 'To' field, all email addresses can be viewed by all recipients. Put multiple addresses in the 'To' field only when every recipient is okay with his or her email address being released to everyone.

- **Using the 'Cc' field**: Cc stands for carbon copy.

  You use the 'Cc' field to send a copy of the email message to people who are not meant to be the direct recipients of the message, but still need to be kept on the loop.

  For instance, if a manager has ordered his secretary to send a memo to everyone in the department, the secretary may place all the department employees' email address on the 'To' section, and the manager's email address on the 'Cc' field.

  Note that, like the 'To' field, all email addresses entered in a 'Cc' field can be viewed by everyone.

- **Using the "Bcc' field**: Bcc stands for Blind carbon copy.

  When you place email addresses in 'Bcc' field, recipients are 'blind' to other recipients' email address. The use of the 'Bcc' field is most appropriate if the recipients have not given permission for their email address to be released, or if there is reason to keep the email address private.

  Because the 'Bcc' field offers privacy that the 'To' and 'Cc' fields do not, you may use the blind carbon copy field for both direct and indirect email messages where privacy of email addresses is needed. If you wish to send an email to many direct recipients, but you don't wish to disclose anyone's email address, just use your own email address in the 'To' field, and use the 'Bcc' field for the recipients' addresses.

GRAMMAR AND ACRONYMS

While online mediums of communication have developed their own vocabulary, it's best to remember that business emails require the same formality as any business letter.

Here are some key things to remember with regards to grammar and the use of acronyms in an email.

- Always follow the rules of good grammar. You may refer to English writing style guides for these rules.
- Always use full sentences and words with proper sentence structure. Don't use text-speak.

  Example: use "*The reports are due on Monday*." instead of "*D reports r due Mon*"
- Proper capitalization and punctuation are a must! In email, all caps give the impression that you're shouting, and small caps are hard to read. Example: use "*The report should include an evaluation report*." Instead of "*The report SHOULD INCLUDE AN EVALUATION REPORT*.
- In business emails, avoid text-speak abbreviations such as BTW (by the way), IMHO (In my honest opinion,) and LOL (laugh out loud). Avoid the use of emoticons, as well.

PRACTICAL ILLUSTRATION

Victoria wanted to write two e-mails. One would be given to her partner, and would be read by everyone on their team. The other e-mail would be sent to everyone in the department, but the information was only relevant to certain members, however everyone needed to stay up to date. The first, she used the ‘To’ field on. This insured it would go to everyone, and everyone would know it was meant for them. The second was given to everyone, but only the partner needed the information. Everyone else received the e-mail so they could stay informed and up to date on the current project and it’s progress.

What a lot we lost when we stopped writing letters. You can't reread a phone call.

William Zinsser

CHAPTER SIX

WRITING BUSINESS LETTERS

Corresponding via letters is a large part of doing business. More than sending a message, business letters are a way to establish rapport, clarify work expectations, and even affirm and encourage co-workers. In this chapter, we will discuss the basic structure of business letters, how to choose the most appropriate format for your business letters.

THE BASIC STRUCTURE

A formal style is recommended for most business correspondence. It shows courtesy, professionalism, and knowledge of protocol. As a rule, use a formal style unless invited otherwise or you have already established a relationship with the person you're writing to.

A formal letter usually contains the following sections:

- Sender's full name and address
- Addressee's full name and address
- Date the letter is sent (or assumed to fall into the hands of the receiver)
- Formal Salutation e.g. "Dear + Formal Address"

- A Subject Heading e.g. “Re: Job Opening for Quality Control Officer”
- Letter Body
- Formal Closing e.g. “Respectfully yours, Sincerely yours,”
- Name and Signature of the Sender

Lay-out on Page. There are two commonly used lay-outs for a formal letter: the block and the semi-block. In the block format, all text is aligned to the left margin and the paragraph is not indented. In the semi-block format, all text is aligned to the left margin but the paragraphs are indented. Both formats are considered appropriate for business correspondence.

CHOOSING A FORMAT

The format of your business letter depends on:

- The stage of your working relationship with the letter recipient.

  For clients that you have just met, or have yet to establish a relationship with, a formal format is always advisable.

- The seniority of the recipient.

  When writing to a senior member of the company, or any individual with a high rank, go for a more formal format.

- Your letter’s privacy.

You may have established greater familiarity with the person you are corresponding to, but remember that all business letters also serve as company record. If you are writing something that would be copy-furnished to many people, mind your tone.

As a rule, take your cue from how the other person responds to you. If they reply in an informal manner, then you may take it as permission to do the same.

You may also refer to your company culture and standard protocol for guidelines.

WRITING THE LETTER

Tips on how to write a business letter:

- Keep your purpose in mind when writing a business letter. There are many types of business letters (e.g. letter of inquiry, letter of application, letter of announcement, letter of congratulations) and each type has suggested content and formats.
- Write with a positive tone. Even if the subject of your letter is unpleasant, it is important to remain courteous and tactful. Building and sustaining goodwill is imperative in all business.
- Follow standard spelling and grammar rules, even if your letter is informal. At the end of the day, you're still writing for business and you should never leave your professional personal behind.

- Personalize your business letter. While there is a generic template for almost every situation, it still speaks well of you if you can make your letters targeted to your recipient.

PRACTICAL ILLUSTRATION

John needed to write a letter to an applicant who did not get into the companies internship program. To start it off, he gathered information on the candidate such as their name and address to head the letter. He kept the tone of the letter as pleasant as possible even though he was delivering rather unpleasant news. John knew that it was vitally important in business to keep a pleasant attitude and tone in all matters to help establish and up keep business relationships. He also made sure to use correct spelling and grammar, and to personalize the letter, so that the applicant will feel assured that they may try once more in the future.

To be persuasive we must be believable; to be believable we must be credible; to be credible we must be truthful.

EDWARD R. MURROW

CHAPTER SEVEN

WRITING PROPOSALS

It is not just in face-to-face interactions that we have to put our best foot forward. The same can be said in written correspondence, more particularly when you are submitting a business proposal. In this chapter, we would discuss the basic structure of a proposal, how to select a proposal format, and tips in writing a proposal.

THE BASIC STRUCTURE

A business proposal is an unsolicited or solicited bid for business. A proposal is usually written to another company or institution. Companies can also require their local departments to write proposals when suggesting solutions to upper management.

At its very basic level, a business proposal answers two things: what the other party needs, and how your company can address this need.

The following is the basic structure of a business proposal:

- Company Overview
- Statement of the Problem (also referred to as the Need Statement)
- Background and Benefits (mostly used for unsolicited proposals)
- Scope of Services/ Deliverables

    - What
    - Who
    - When
    - Where
    - How
    - How much
- Contact Details
- References

To follow is a sample business proposal.

NOTE: This sample is just a basic draft for the purpose of illustration. The succeeding section gives more information on business proposal formats.

COMPANY OVERVIEW

Linkages International is South Carolina's fastest growing technical support company. In our three years of service, we have provided customer assistance for 27 multinational companies, 6 of which are in the Fortune 500 list.

Statement of the Problem

The credibility of many online industries depends on how fast and how efficiently they can respond to telephone calls and email messages. Without an actual physical location that customers can go to for inquiries, assistance and complaints, telephone, and email assume the role of the company's physical presence. The lack of a top of the line customer support system for phone and email communication can seriously affect your business' bottom line!

Scope of Services/ Deliverables

What? 24 hour customer assistance via telephone and email.

Who? Trained and qualified customer service representatives will answer all inquiries.

When? Set up can begin immediately. 1 year, 3 year and 5 year contracts available.

Where? All customer service personnel and equipment would be hosted by Linkages International's main office in Jameson Blvd.

How? The Linkages International process involves:

Consultation. Linkages International staff would meet with your company to determine your specific needs and preferences.

Staff Training. Customer representatives assigned to your company would be trained in your company profile, product range and other technical knowledge necessary to accomplish the job.

Set-up. Dedicated phone and internet lines would be set up for your company.

How much? Please see attached document for our package rates.

Contact Details

Mr. Raymond Daniels
Head of Sales and Marketing, Linkages International
790 Hampden Park, North Carolina

References

Mr. Jason Orange
Director, Mediatrix Corporation
4556 Croke Park, New Mexico

Ms. Rutina Compton
Customer Service Head, Joint Ventures Ltd.
147 QHU Hall, West Covina

CHOOSING A FORMAT

There is no one universal format for business proposals. The format that you should use depends on:

Intended recipient of the proposal:

Some companies and institutions require formal, structured, and very detailed proposals. For example, government agencies requesting bids for use of public funding require that you outline to the letter how the money would be spent and how the expenditure would go to the target result. They may request additional information like your business plan and financial statement. Proposals like these can be as long as 100 pages. They usually require a cover letter, apart from the proposals itself.

Others are more relaxed; they can be as short as 1-2 pages. Proposals submitted through online marketplaces, for example, do not require much structure due to the informal medium of communication. If you've already established a relationship with the other party, you need not include the 'selling' part of your proposal --- you can go straight to pricing and deliverables. Deliverables that don't require much technical explanation can be presented in bullet form.

The scale/ scope of the project:

Others are guided by how big the project is. Large projects require a more detailed proposal, while proposals for smaller tasks can be written using a more informal format.

As a guide, take your cue from the way the Request for Proposal (to be discussed in a later Chapter) is written. If the request is written in a formal and structured fashion, then respond similarly. If the request is presented in a more relaxed fashion, then you can be more relaxed. If they are asking for specific information from you, then include it in the format.

If you're uncertain, inquire with the company/ institution how they'd like your proposal to be presented. There's nothing wrong in asking!

As a guide, take your cue from the way the Request for Proposal (to be discussed in a later Chapter) is written. If the request is written in a formal and structured fashion, then respond similarly. If the request is presented in a more relaxed fashion, then you can be more relaxed. If they are asking for specific information from you, then include it in the format.

If you're uncertain, inquire with the company/ institution how they'd like your proposal to be presented. There's nothing wrong in asking!

WRITING THE PROPOSAL

Make sure your business proposal is:

- **Targeted**: On target means that you have carefully studied what the other party's need is, and you can show that you are their best option in addressing that concern.
- **Well-substantiated**: Substantiated means filled with evidence to back your claims. Decide which facts or statistics best support

the project. Substantiation may also come in the form of a carefully thought out project plan.

- **Persuasive**: Always keep your prime selling point in mind and make sure your writing emphasize it. Keep your tone proactive and optimistic. Don’t give generic content; demonstrate how your proposal is better than others they would receive.

  Unsolicited proposal requires a harder ‘sell’ than solicited ones.

- **Organized**: A winning proposal is easy to evaluate. Picture the evaluator with a checklist in hand going through your proposal --- check, check, check. Give the other party the information that they want, in the order that they want it. Get rid of all unnecessary detail.

PRACTICAL ILLUSTRATION

Joe had to write a proposal to an old business partner to the company. He wanted to demonstrate that the new service they had to offer was in the best interest of the partner. The service was rather large scale, so he went into detail on how it could be beneficial, while not trying to sell the matter, as they were already business partners. After going through each bit of information in detail he arrived at the bottom line: The price. His proposal was so detailed, and the bottom line was so well presented, the old clients now have an even stronger relationship with the company.

I notice that you use plain, simple language, short words and brief sentences. That is the way to write English — it is the modern way and the best way.

Mark Twain

CHAPTER EIGHT

WRITING REPORTS

Documentation is important in business. Sometimes documentation is the only way supervisors can monitor the company's quality of work. At other times, documentation is the key to spotting best and worst practices.

In this chapter, we will discuss the basic structure of reports, how to choose the right format, and tips on writing reports.

THE BASIC STRUCTURE

Business reports are used to provide documentation — a written record — of a topic, project, or process.

The following are the basic parts of a business report:

- Overview
- Background/ Project Scope
- Main Body
- Conclusions

The main body section of the report contains all of the details of the project or topic, including facts, methods, data, calculations, results, and interpretation. Depending on what type of report you are writing, the conclusion section provides the final result, recommendation, proposal, or concluding judgment of the report's authors.

CHOOSING A FORMAT

As with the other business documents, such as the business proposal and the business letter, the format and length of business reports vary depending on the situation.

Be guided by the:

- The purpose of the report
- The seniority of your readers
- Your readers' technical knowledge
- The scale of the project
- Standard protocol in your company

NOTE: The rationale behind the above criteria is similar to how the same criteria had been explained in previous Chapters.

WRITING THE REPORT

The following are some tips in writing a business report.

- Keep the purpose of the report in mind when writing your report.

  Ask the person who requested the reports what they are expecting to see in the report and how they plan to use your documentation. This information can guide you in discerning what data to include in the report.

- Stick to objective data, unless there is a section for personal opinions.

Reports are meant to be fact-based and impartial; it's not written so that you can present the company's performance in the best possible light. It is only when a report is accurate can the report be truly useful. Therefore, make sure that you double-check your content. Watch if you have biases coming through on paper. If your opinions are solicited, stick to give professional opinions substantiated by facts.

- Write to your audience.

  Know who you are writing to, and determine how best to address this audience. Define the tone, attitude, and emphasis that are geared towards your readers.

PRACTICAL ILLUSTRATION

Karen had to write a report for the CEO. When she was given the assignment, the first thing she asked was for more details on the specifics of the report, since it was for the CEO, it needed to have details that would be relevant to the CEO. Karen made sure to keep it strictly factual and objective, leaving out any personal feelings on the subject matter. She had an introduction, the body that she filled with the facts and statistics, and the closing. The CEO was happy with the report, and she successfully helped him and the company.

Good writing is the result of good planning and clear thinking.

Warren Bennis

CHAPTER NINE

OTHER TYPES OF DOCUMENTS

There are many types of documents used in business aside from agenda, business reports and proposals. In this chapter, we will discuss an overview of four other types: the Request for Proposals, Projections, Executive Summaries and Business Cases.

REQUESTS FOR PROPOSALS

A Request for Proposals (RFP) is an invitation for vendors and/ or service providers to submit a qualified pitch to address a company's need. At the very least, RFPs inform the public that you are in the look-out for potential partners in an endeavor. At best, a well-written RFP helps you source out vendors and service providers who fit well with your needs and objectives.

There is no one right format for the RFP. Some can be informal and as short as 1-2 pages. Bigger projects, especially those that involve funding from government or private interest groups, have RFPs as long as a graduate thesis!

Effective RFPs should at least explain:

- What the project is

- What *exactly* do you require as output (your deliverables)
- How proposals would be reviewed
- Your contact information

More detailed RFPs can include additional information like the background of your company/ organization, your project timetable, your budget for the project, specific legal stipulations (e.g. the need to sign a non-disclosure agreement), incentives for superior service, and ways the project would be monitored and evaluated.

The best way to know what you include in a Request for Proposals is to put yourself in the shoes of your targeted vendor or service-provider. Ask yourself: what would you need to know to submit an accurate and qualified bid? What would motivate you to submit a great proposal?

In the next page is a sample Request for Proposals.

(Note: This sample includes only basic information for the purpose of illustration. An actual RFP for the project described is recommended to be more detailed to be effective.)

REQUEST FOR PROPOSALS

Who we are:

Mitchell & Clark Industries is the country's premier manufacturer of home appliances. This January 2010, we would be opening our 17th branch in Louisville, Kentucky. We are going to outsource all employee recruitment for the new branch.

What we are looking for:

What we are looking for a team of Human Resource Practitioners who would be willing to take on the tasks of:

- sourcing applicants for our 200 open positions,
- conducting all the pre-requisite psychological evaluation and background check, and deciding on the best candidate per position.

The timeline for this project is November 1- December 31, 2009.

How proposals would be evaluated:

Proposals would be judged based on:

- Quality of applicant selection and screening process proposed.
- Budget (Priority would be given to contractors who can provide all services for less than $50,000)
- Applicant's background and credentials in Employee Recruitment

Please address your proposals to Ms. Josie Ackles, Human Resources Director. Mitchell & Clark Main Office, 1248 Hollbrook Drive, New York City.

PROJECTIONS

Projections are documents that show estimates of future performance, alongside data that can substantiate your predictions. The most common projection document is financial projection, which shows future income based on present and anticipated cash flow.

Projections can be short-term, forecasting income in the next quarter or next year. They can also be long-term, going as far forward as a decade. Some projection documents present case scenarios, showing predictions based on changes in particular variables.

Projections are usually illustrated by figures, tables, and spreadsheets. The statistics included in a projection depends on the purpose of the document. (This data is beyond the scope of this Chapter.)

The key thing to remember is to accurately label figures, tables and spreadsheets, so that your reader can easily understand what you are presenting. You have the option of placing your numerical data with the text, or including them in the activities folder.

EXECUTIVE SUMMARIES

An executive summary is a 1-2 page abstract of a business plan. It is a non-technical review of the highlights of your in-depth report.

An executive summary usually include the following sections:

- Overview of the company, including products and/or services

- Company Mission Statement
- Management and Staff
- Market and Customer
- Your Competitive Edge
- Business Operations
- Financial Projections and Plans

It is recommended that you write an executive summary after you've written the entire business plan. This way, you can easily summarize in 1-2 sentences each section of the business report.

A key guide in writing executive summaries is to use positive and proactive language. Executive summaries are a selling paper; they are usually used to get capital, win contracts, or showcase a company's achievement. This is why most executive summaries end with a 'pitch' for the business at the end.

Below is an example of an Executive Summary:

Graceful Bee Dance Studio Executive Summary

Graceful Bee Dance Studio is a renowned dancing studio that offers training in ballroom, jazz, and contemporary routines. We offer beginner's classes and pro workshops. We pride ourselves in being the only dance studio in California which provides personalized instruction from expert in each dance field.

Our clients range from amateur to professional dancers across all age groups, men, and women. The studio owner and director, Mr. Julian McAvoy, is a three time international jazz champion. Our dancing instructors are graduates of prestigious dance academies in the United States and overseas.

Across the United States, there is a documented boom in the dance instruction industry for the past five years. A market research conducted by McCann-Erickson last year showed that the growing population of singles is more interested in careers within the entertainment industry, with Los Angeles remaining the top go-to place to get dance training. This finding is substantiated by the 25% growth in our enrollees from 2007-2009, majority of whom are singles.

While there are many dance studios in the California area, ours is the only studio that offers personalized instruction by renowned teachers. Our teacher-student ratio is 1:1 to 1:3, guaranteeing maximum attention. We also boast of a roster of graduates who have won international dance competitions.

Based on the size of our market and our defined market area, our income projection for the next five years is $350,000. We are seeking business credit line of $500,000 to finance a second branch offering courses in tap dance, hip-hop, and ballet. California United Bank has already approved a business loan of $300,000, with owner Julian McAvoy financing the remaining balance.

Already, we have commitments from 30 enrollees for the new studio. Mr. McAvoy and company are also scheduled to appear as guest judge in national dance reality show 'Step!' which is projected to result in an increase in clientele.

Expert dance instruction tailor-fitted to your skill level, learning style and personality --- what else you ask for in a dance studio?

BUSINESS CASES

A business case is documentation about a specific process, project, or situation. It is like a business plan, except the focus is on a particular 'case' rather than the entire business. A business case is usually written to justify a program, solicit extra funding, or simply create a record of how a project was done (or how the project is proposed to be done.) Business cases can be comprehensive and formal, as well as informal and brief, depending on the purpose of a document.

- A business case can include the following sections:
- Background of the problem/ opportunity
- Problems encountered
- Options considered and cost-benefit analysis
- Solution selected and implementation strategy
- Expected costs of the project

An executive summary and a projection, discussed earlier, may also be found in a business case.

PRACTICAL ILLUSTRATION

Mitch needed to write a request for a proposal and a projection for the company. He didn't have any set formal format for the proposal request, so he wrote a two page informal request that simply asked for proposals. When he went about the projection, Mitch made a slideshow and had illustrated graphs to better show the statistics and figures in the projection. Overall, his request was met with a plethora of proposals and his projection was spot on and helped the management get a better idea of the future of the company and how it should be approached.

Make sure you
always proofread.
You'll never know if
you've missed 'a' out.

Anonymous


delete
enter
return
shift

CHAPTER TEN

PROOFREADING AND FINISHING

The writing process does not end with getting the words on paper or on screen. You also need to review your work carefully, make sure that it's free from errors. In this chapter we will give you an overview of the processes of proofreading, peer review, and preparing a manuscript for printing and publishing.

A PROOFREADING PRIMER

Proofreading is the systematic check for spelling, punctuation, grammar, and typographical errors. It is different from editing, which is the check for the accuracy, consistency, clarity, and organization of written text.

Deliberate time and effort must be given to proofreading. Our minds can easily miss omitted words, incorrect spelling or improper use of sentence structures, unless trained to look for them. This happens particularly when we are proofreading our own work, or when we are familiar with the subject matter of the document.

Moreover, we think way faster than we can type. The gap between our thinking process and our typing makes it likely that we'd miss certain words out.

Spell-check and grammar-check functions in word processing software are good ways to start the proofreading process. Note though that they are not reliable in spotting all errors. In fact, they may even consider correct usage as an error, so be sure to double-check!

Here are some tips on effective proofreading:

- Avoid proofreading immediately after writing. If possible, put the material aside for a few hours before starting the process. At the very least, shift to a 'critical' mindset before proofreading your own work.
- Go slowly, considering every word. Read what is actually on the page and watch if you're filling in blanks!
- Look for one error at a time. You can start at different parts of the paper every time to avoid the negative effects of familiarity with the text.

HOW PEER REVIEW CAN HELP

Peer review is the process of submitting your work to the scrutiny of another writer, an expert, or a fellow member of your team, with the goal of getting constructive feedback. Peer review can be done 'blindly', with the identity of the writers kept from the reviewer or in a more open fashion.

Peer review benefits both the writer and the reviewer:

The writer gains insight on the quality of their writing, or at least how their work comes across to one reader. They also get advice on the strengths and weaknesses of their writing, from someone presumably working in the same context that they do. This advice can help them improve both present and future work.

The reviewer, on the other hand, gets to develop their proofreading and editing skills, which can help them in identifying and resolving their own writing issues.

It's important that you choose carefully who would review your work. While a fellow team member --- a peer--- can already be effective in getting valuable feedback, not everyone is effective as a reviewer. If a reviewer does not have enough time to review your work, is biased towards an error, even biased against you, then you might not get good feedback.

PRINTING AND PUBLISHING

A manuscript can look perfect on your computer screen or on your draft copy, but there's no guarantee that the final printed or published version will be the same. It is important that you take time to anticipate printing and publishing issues when writing. Here are some tips on printing and publishing your business documents:

- Always check the 'print preview' (a function available in most word processing software) before printing a document. Make sure that all text, tables, and graphics are within the page margin and the page is properly laid out.
- Be careful when changing computers for printing purposes. Opening a document using different software, or an outdated

software version, from the original can result in formatting errors. This is the reason why many prefer to use portable data files (.pdf) for printing and publishing.

- Check your publisher for guidelines on what quality of graphics, pictures and clip arts you should use. Images of a low pixel count may not translate well on print, depending on the quality of the printer and ink.
- To be sure, always have a print draft for review before making many copies. Typesetting can introduce errors in a text that weren't there before. Autocorrect functions in word processing software can also introduce errors.

PRACTICAL ILLUSTRATION

Jenny and Perry had their reports finished, but still needed to proofread. In order to get the job done effectively, they needed a second perspective, so they traded papers and performed a peer review. They both spotted some areas that needed improving, and so they both improved their reports. Before printing them out to be delivered, they made sure to check the preview of the print. Perry discovered his settings were wrong, and he set them right before the print out. When the reports were delivered, they were well proofread and printed out perfectly.

This feeling, finally, that we may change things - this is at the centre of everything we are. Lose that... lose everything.

Sir David Hare

CLOSING THOUGHTS

- **Yogi Berra**: In theory there is no difference between theory and practice. In practice there is.
- **Dwight Eisenhower**: Plans are nothing; planning is everything.
- **Jonas Salk**: The reward for work well done is the opportunity to do more.

Rick Chisholm made history when he single-handedly changed the professional Audio Visual industry by breaking all the rules and capitalised over 50% market share in Australia with very little capital, no partners, mergers or lenders and set up the first franchise operation of its kind in the world in the late 1990's and early 2000's.

As a 7x founder of companies and 30x businesses such as Innovest, AI Machine, Lightsounds, LSW, Light Emotion with revenue in excess of $300 million and having employed more than 1,000 staff over the last 35 years. Rick is known as the Start-Up and SME Guru and is Author of a number of books including Business Success for Life. Unlike many mentors, he actually walks the talk and has a number of businesses under management in such areas as Automation, Events management, Importing, Distribution, Retailing and E-commerce.

His BIG passion is Business Education empowering Businesses Owners through knowledge and skills. Whilst Rick has experienced great success, he has also endured many failures. Rick has faced and overcome the exact same challenges you are facing now.

Tala Chisholm is an SME specialist who has owned and managed several small to medium sized businesses in the last 20 years, several of which were eventually sold. She has extensive experience in the fields of retail, franchising, licensing, dealerships, education, importing, distribution and consulting.

Her expertise lies in building and implementing customised cross-platform database and software solutions for businesses, automation, IT, web marketing, advertising, graphic design, business administration, process refinement and implementation. Her business experience ranges from bricks-and-mortar Giftware retailing to highly technical fields such as Security, CCTV, Entertainment Lighting and Audio sales, hire and installations as well as e-commerce.

Throughout her career she also trained and mentored Franchise business owners as well as internal division managers. Some areas of training included retail operations, management practices, business strategy, accounting, cash-flow, marketing, customer service and IT. She has also headed up the drafting of Operating Compliance Manuals for Franchise operations and implementation of all the elements involved.

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