

5.2 A Planning Checklist for Business Messages

LEARNING OBJECTIVES

1. Understand who, what, where, when, why, and how as features of writing purpose.
2. Describe the planning process and essential elements of a business document.

John Thill and Courtland Bovee, Thill, J. V., & Bovee, C. L. (2004). *Business communication today* (8th ed.). Upper Saddle River, NJ: Prentice Hall. Two leading authors in the field of business communication, have created a checklist for planning business messages. The following twelve-item checklist, adapted here, serves as a useful reminder of the importance of preparation in the writing process:

1. Determine your general purpose: are you trying to inform, persuade, entertain, facilitate interaction, or motivate a reader?
2. Determine your specific purpose (the desired outcome).
3. Make sure your purpose is realistic.
4. Make sure your timing is appropriate.
5. Make sure your sources are credible.
6. Make sure the message reflects positively on your business.
7. Determine audience size.
8. Determine audience composition.
9. Determine audience knowledge and awareness of topic.
10. Anticipate probable responses.
 1. Select the correct channel.
 2. Make sure the information provided is accurate, ethical, and pertinent.

Throughout this chapter we will examine these various steps in greater detail.

Determining Your Purpose

Preparation for the writing process involves purpose, research and investigation, reading and analyzing, and adaptation. In the first section we consider how to determine the purpose of a document, and how that awareness guides the writer to effective product.

While you may be free to create documents that represent yourself or your organization, your employer will often have direct input into their purpose. All acts of communication have general and specific purposes, and the degree to which you can identify these purposes will influence how effective your writing is. **General purposes** involve the overall goal of the communication interaction: to inform, persuade, entertain, facilitate interaction, or motivate a reader. The general purpose influences the presentation and expectation for feedback. In an informative message—the most common type of writing in business—you will need to cover several predictable elements:

- Who

- What
- When
- Where
- How
- Why (optional)

Some elements may receive more attention than others, and they do not necessarily have to be addressed in the order you see here. Depending on the nature of your project, as a writer you will have a degree of input over how you organize them.

Note that the last item, *Why*, is designated as optional. This is because business writing sometimes needs to report facts and data objectively, without making any interpretation or pointing to any cause-effect relationship. In other business situations, of course, identifying why something happened or why a certain decision is advantageous will be the essence of the communication.

In addition to its general purpose (e.g., to inform, persuade, entertain, or motivate), every piece of writing also has at least one specific purpose, which is the intended outcome; the result that will happen once your written communication has been read.

For example, imagine that you are an employee in a small city's housing authority and have been asked to draft a letter to city residents about radon. Radon is a naturally occurring radioactive gas that has been classified by the United States Environmental Protection Agency as a health hazard. In the course of a routine test, radon was detected in minimal levels in an apartment building operated by the housing authority. It presents a relatively low level of risk, but because the incident was reported in the local newspaper, the mayor has asked the housing authority director to be proactive in informing all the city residents of the situation.

The general purpose of your letter is to inform, and the specific purpose is to have a written record of informing all city residents about how much radon was found, when, and where; where they can get more information on radon; and the date, time, and place of the meeting. Residents may read the information and attend or they may not even read the letter. But once the letter has been written, signed, and distributed, your general and specific purposes have been accomplished.

Now imagine that you begin to plan your letter by applying the above list of elements. Recall that the letter informs residents on three counts: (1) the radon finding, (2) where to get information about radon, and (3) the upcoming meeting. For each of these pieces of information, the elements may look like the following:

1. Radon Finding

- Who: The manager of the apartment building (give name)
- What: Discovered a radon concentration of 4.1 picocuries per liter (pCi/L) and reported it to the housing authority director, who informed the city health inspector, environmental compliance office, and mayor
- When: During the week of December 15
- Where: In the basement of the apartment building located at (give address)
- How: In the course of performing a routine annual test with a commercially available do-it-yourself radon test kit

2. Information about radon

- Who: According to the city health inspector and environmental compliance officer
- What: Radon is a naturally occurring radioactive gas that results from the breakdown of uranium in soil; a radon test level above 4.0 pCi/L may be cause for concern
- When: Radon levels fluctuate from time to time, so further testing will be done; in past years, test results were below 4.0 pCi/L
- Where: More information is available from the U.S. Environmental Protection Agency or the state radon office
- How: By phone, mail, or on the Internet (provide full contact information for both sources)
- Why: To become better informed and avoid misunderstandings about radon, its health risks, and the meaning of radon test results

3. City meeting about radon

- Who: All city residents are welcome
- What: Attend an informational meeting where the mayor, director of the housing authority, city health inspector, and city environmental compliance officer will speak and answer questions
- When: Monday, January 7, at 7 p.m.
- Where: City hall community room
- Why: To become better informed and avoid misunderstandings about radon, its health risks, and the meaning of radon test results

Once you have laid out these elements of your informative letter, you have an outline from which it will be easy to write the actual letter.

Your effort serves as a written record of correspondence informing them that radon was detected, which may be one of the specific or primary purposes. A secondary purpose may be to increase attendance at the town hall meeting, but you will need feedback from that event to determine the effectiveness of your effort.

Now imagine that instead of being a housing authority employee, you are a city resident who receives that informative letter, and you happen to operate a business as a certified radon mitigation contractor. You may decide to build on this information and develop a persuasive message. You may draft a letter to the homeowners and landlords in the neighborhood near the building in question. To make your message persuasive, you may focus on the perception that radiation is inherently dangerous and that no amount of radon has been declared safe. You may cite external authorities that indicate radon is a contributing factor to several health ailments, and even appeal to emotions with phrases like “protect your children” and “peace of mind.” Your letter will probably encourage readers to check with the state radon office to verify that you are a certified contractor, describe the services you provide, and indicate that friendly payment terms can be arranged.

Credibility, Timing, and Audience

At this point in the discussion, we need to visit the concept of credibility. **Credibility**, or the perception of integrity of the message based on an association with the source, is central to any communication act. If the audience perceives the letter as having presented the information in an impartial and objective way, perceives the health inspector’s and environmental compliance officer’s expertise in the field as relevant to the topic, and generally regards the housing authority in a positive light, they will be

likely to accept your information as accurate. If, however, the audience does not associate trust and reliability with your message in particular and the city government in general, you may anticipate a lively discussion at the city hall meeting.

In the same way, if the reading audience perceives the radon mitigation contractor's letter as a poor sales pitch without their best interest or safety in mind, they may not respond positively to its message and be unlikely to contact him about any possible radon problems in their homes. If, however, the sales letter squarely addresses the needs of the audience and effectively persuades them, the contractor may look forward to a busy season.

Returning to the original housing authority scenario, did you consider how your letter might be received, or the fear it may have generated in the audience? In real life you don't get a second chance, but in our academic setting, we can go back and take more time on our assignment, using the twelve-item checklist we presented earlier. Imagine that you are the mayor or the housing authority director. Before you assign an employee to send a letter to inform residents about the radon finding, take a moment to consider how realistic your purpose is. As a city official, you may want the letter to serve as a record that residents were informed of the radon finding, but will that be the only outcome? Will people be even more concerned in response to the letter than they were when the item was published in the newspaper? Would a persuasive letter serve the city's purposes better than an informative one?

Another consideration is the timing. On the one hand, it may be important to get the letter sent as quickly as possible, as the newspaper report may have already aroused concerns that the letter will help calm. On the other hand, given that the radon was discovered in mid-December, many people are probably caught up in holiday celebrations. If the letter is mailed during the week of Christmas, it may not get the attention it deserves. After January 1, everyone will be paying more attention to their mail as they anticipate the arrival of tax-related documents or even the dreaded credit card statement. If the mayor has scheduled the city hall meeting for January 7, people may be unhappy if they only learn about the meeting at the last minute. Also consider your staff; if many of them will be gone over the holidays, there may not be enough staff in place to respond to phone calls that will likely come in response to the letter, even though the letter advises residents to contact the state radon office and the Environmental Protection Agency.

Next, how credible are the sources cited in the letter? If you as a housing authority employee have been asked to draft it, to whom should it go once you have it written? The city health inspector and environmental compliance officer are mentioned as sources; will they each read and approve the letter before it is sent? Is there someone at the county, state, or even the federal level who can, or should, check the information before it is sent?

The next item on the checklist is to make sure the message reflects positively on your business. In our hypothetical case, the "business" is city government. The letter should acknowledge that city officials and employees are servants of the taxpayers. "We are here to serve you" should be expressed, if not in so many words, in the tone of the letter.

The next three items on the checklist are associated with the audience profile: audience size, composition, knowledge, and awareness of the topic. Since your letter is being sent to all city residents, you likely have a database from which you can easily tell how many

readers constitute your audience. What about audience composition? What else do you know about the city’s residents? What percentage of households includes children? What is the education level of most of the residents? Are there many residents whose first language is not English; if so, should your letter be translated into any other languages? What is the range of income levels in the city? How well informed are city residents about radon? Has radon been an issue in any other buildings in the city in recent years? The answers to these questions will help determine how detailed the information in your letter should be.

Finally, anticipate probable responses. Although the letter is intended to inform, could it be misinterpreted as an attempt to “cover up” an unacceptable condition in city housing? If the local newspaper were to reprint the letter, would the mayor be upset? Is there someone in public relations who will be doing media interviews at the same time the letter goes out? Will the release of information be coordinated, and if so by whom?

One additional point that deserves mention is the notion of decision makers. Even if your overall goal is to inform or persuade, the basic mission is to simply communicate. Establishing a connection is a fundamental aspect of the communication audience, and if you can correctly target key decision makers you increase your odds for making the connection with those you intend to inform or persuade. Who will open the mail, or e-mail? Who will act upon it? The better you can answer those questions, the more precise you can be in your writing efforts.

In some ways this is similar to asking your professor to write a letter of recommendation for you, but to address it to “to whom it may concern.” If you can provide a primary contact name for the letter of recommendation it will increase its probable impact on the evaluation process. If your goal is to get a scholarship or a job offer, you want to take the necessary steps to increase your positive impact on the audience.

Communication Channels

Purpose is closely associated with channel. We need to consider the purpose when choosing a channel. From source to receiver, message to channel, feedback to context, environment, and interference, all eight components play a role in the dynamic process. While writing often focuses on an understanding of the receiver (as we’ve discussed) and defining the purpose of the message, the channel—or the “how” in the communication process—deserves special mention.

So far, we have discussed a simple and traditional channel of written communication: the hardcopy letter mailed in a standard business envelope and sent by postal mail. But in today’s business environment, this channel is becoming increasingly rare as electronic channels become more widely available and accepted.

When is it appropriate to send an instant message (IM) or text message versus a conventional e-mail or fax? What is the difference between a letter and a memo? Between a report and a proposal? Writing itself is the communication medium, but each of these specific channels has its own strengths, weaknesses, and understood expectations that are summarized in [Table 5.1 "Written Communication Channels"](#).

Table 5.1 Written Communication Channels

Channel	Strengths	Weaknesses	Expectations	When to Choose

IM or Text Message	<ul style="list-style-type: none"> • Very fast • Good for rapid exchanges of small amounts of information • Inexpensive 	<ul style="list-style-type: none"> • Informal • Not suitable for large amounts of information • Abbreviations lead to misunderstandings 	Quick response	<ul style="list-style-type: none"> • Informal use among peers at similar levels within an organization • You need a fast, inexpensive connection with a colleague over a small issue and limited amount of information
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Channel	Strengths	Weaknesses	Expectations	When to Choose
E-mail	<ul style="list-style-type: none"> • Fast • Good for relatively fast exchanges of information • "Subject" line allows compilation of many messages on one subject or project • Easy to distribute to multiple recipients • Inexpensive 	<ul style="list-style-type: none"> • May hit "send" prematurely • May be overlooked or deleted without being read • "Reply to all" error • "Forward" error • Large attachments may cause the e-mail to be caught in recipient's spam filter 	Normally a response is expected within 24 hours, although norms vary by situation and organizational culture	<ul style="list-style-type: none"> • You need to communicate but time is not the most important consideration • You need to send attachments (provided their file size is not too big)
Fax	<ul style="list-style-type: none"> • Fast • Provides documentation 	<ul style="list-style-type: none"> • Receiving issues (e.g., the receiving machine may be out of paper or toner) • Long distance telephone charges apply • Transitional telephone-based technology losing popularity to online 	Normally, a long (multiple page) fax is not expected	<ul style="list-style-type: none"> • You want to send a document whose format must remain intact as presented, such as a medical prescription or a signed work order • Allows use of letterhead to represent your company

		information exchange		
Memo	<ul style="list-style-type: none"> • Official but less formal than a letter • Clearly shows who sent it, when, and to whom 	<ul style="list-style-type: none"> • Memos sent through e-mails can get deleted without review • Attachments can get removed by spam filters 	Normally used internally in an organization to communicate directives from management on policy and procedure, or documentation	You need to communicate a general message within an organization
Letter	<ul style="list-style-type: none"> • Formal • Letterhead represents your company and adds credibility 	<ul style="list-style-type: none"> • May get filed or thrown away unread • Cost and time involved in printing, stuffing, sealing, affixing postage, and travel through the postal system 	Specific formats associated with specific purposes	You need to inform, persuade, deliver bad news or negative message, and document the communication
Report	Significant time for preparation and production	Requires extensive research and documentation	Specific formats for specific purposes; generally reports are to inform	You need to document the relationship(s) between large amounts of data to inform an internal or external audience
Proposal	Significant time for preparation and production	Requires extensive research and documentation	Specific formats for specific purposes; generally proposals are to persuade	You need to persuade an audience with complex arguments and data

By choosing the correct channel for a message, you can save yourself many headaches and increase the likelihood that your writing will be read, understood, and acted upon in the manner you intended.

Our discussion of communication channels would not be complete without mentioning the issues of privacy and security in electronic communications. The American Management Association American Management Association. (2007). *Electronic monitoring & surveillance survey: Over half of all employers combined fire workers for e-mail & Internet abuse*. Retrieved from <http://press.amanet.org/press-releases/177/2007-electronic-monitoring-surveillance-survey> estimates that about two thirds of employers

monitor their employees' electronic communications or Internet use. When you call and leave a voice message for a friend or colleague at work, do you know where your message is stored? There was a time when the message may have been stored on an analog cassette in an answering machine, or even on a small pink handwritten note which a secretary deposited in your friend's in-box. Today the "where" is irrelevant, as the in-box is digital and can be accessed from almost anywhere on the planet. That also means the message you left, with the representation of your voice, can be forwarded via e-mail as an attachment to anyone. Any time you send an IM, text, or e-mail or leave a voice message, your message is stored on more than one server, and it can be intercepted or forwarded to persons other than the intended receiver. Are you ready for your message to be broadcast to the world? Do your words represent you and your business in a positive light?

Newsweek columnist Jennifer Ordoñez raises this question when she writes, "For desk jockeys everywhere, it has become as routine as a tour of the office-supply closet: the consent form attesting that you understand and accept that any e-mails you write, Internet sites you visit or business you conduct on your employer's computer network are subject to inspection." Ordoñez, J. (2008, July 14). *The technologist: They can't hide their prying eyes*. Retrieved from <http://www.newsweek.com/id/143737> As you use MySpace, update your Facebook page, get LinkedIn, Twitter, text, and IM, you leave an electronic trail of "bread crumbs" that merge personal and professional spheres, opening up significant issues of privacy. In our discussion we address research for specific business document production, and all the electronic research conducted is subject to review. While the case law is evolving as the technology we use to interface expands, it is wise to consider that anything you write or record can and will be stored for later retrieval by people for whom your message was not initially intended.

In terms of writing preparation, you should review any electronic communication before you send it. Spelling and grammatical errors will negatively impact your credibility. With written documents we often take time and care to get it right the first time, but the speed of IM, text, or e-mail often deletes this important review cycle of written works. Just because the document you prepare in IM is only one sentence long doesn't mean it can't be misunderstood or expose you to liability. Take time when preparing your written messages, regardless of their intended presentation, and review your work before you click "send."

KEY TAKEAWAY

Choose the most effective channel for your document and consider the possible ramifications of what you have written before you send it.

EXERCISES

1. Write a one-page letter to a new customer introducing a new product or service. Compare your result to the letters your classmates wrote. What do the letters have in common? How do they differ from one another?
2. Write a memo that addresses a new norm or protocol, such as the need to register with a new company that will be handling all the organization's business-related travel, with specific expectations including what information is needed, when, and to whom.
3. Make a list of the written communication that you read, skim, or produce in a

one day. Please share your results with the class.

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