The Three-Step Writing Process
### From the Real World

“People have just gone ahead and experimented. There are some very interesting models emerging.”

—Ben Edwards
Manager of Investor Communications, IBM
www.ibm.com

### Learning Objectives

After studying this chapter, you will be able to

1. Describe the three-step writing process
2. List four questions that can help you test the purpose of your message
3. Describe the importance of analyzing your audience and identify the six factors you should consider when developing an audience profile
4. Discuss gathering information for simple messages and identify three attributes of quality information
5. List factors to consider when choosing the most appropriate medium for your message
6. Explain why good organization is important to both you and your audience
7. Summarize the process for organizing business messages effectively

After launching a breakthrough podcasting series called “IBM and the Future of . . .” as a way of letting IBM experts share knowledge on a wide range of topics with customers and investors, the company made podcasting tools available to all its employees, then sat back to see how they might take advantage of this exciting new medium. Not surprisingly for a company full of bright, creative people, IBM staffers began distributing a wide variety of messages via podcast. One gained an instant following by podcasting about the daily challenges and rewards of being a mobile information worker. Another saved hundreds of thousands of dollars a year in telephone charges simply by replacing a massive weekly teleconference with podcasts. No matter what the technology, innovators such as IBM are constantly looking for new ways to reach their audiences with effective messages.1

### Understanding the Three-Step Writing Process

Choosing the medium is one of the most important steps in planning your business messages, and as IBM demonstrates, the options seem to multiply all the time. Whether you’re creating simple e-mails and instant messages or complex reports and presentations that may require weeks of planning and writing, your goal is to create messages that have a clear purpose, meet the needs of your audience, and communicate efficiently. For every
message you send, you can reduce the time and energy it takes to achieve this goal by following a clear and proven three-step process (see Figure 3.1):

- **Planning business messages.** To plan any message, first **analyze the situation** by defining your purpose and developing an audience profile. With that in mind, you can **gather information** that will meet your audience’s needs. Next, **select the right medium** (oral, written, or electronic) to deliver your message. With those three factors in place, you’re ready to **organize the information** by defining your main idea, limiting your scope, selecting an approach, and outlining your content. Planning messages is the focus of this chapter.

- **Writing business messages.** Once you’ve planned your message, **adapt to your audience** with sensitivity, relationship skills, and style. Then you’re ready to **compose the message** by choosing strong words, creating effective sentences, and developing coherent paragraphs. Writing business messages is discussed in Chapter 4.

- **Completing business messages.** After writing your first draft, **revise the message** to make sure it is clear, concise, and correct. Next **produce the message**, giving it an attractive, professional appearance. **Proofread** the final product for typos, spelling errors, and other mechanical problems. Finally, **distribute the message** using the best combination of personal and technological tools. Completing business messages is discussed in Chapter 5.

Throughout this book, you’ll see the three steps in this process applied to a wide variety of business messages: basic tasks for short messages (Chapters 6 through 9), additional tasks for longer messages (Chapter 10 and 11), special tasks for oral presentations (Chapter 12), and distinct tasks for employment messages (Chapter 14).

The more you use the three-step writing process, the easier and faster it will become. You’ll also get better at allotting your time for each step. As a general rule, try using roughly half your time for planning, a quarter of your time for writing, and the remaining quarter for completing the project. Even for small writing projects, resist the temptation to skip the planning step. For instance, spending even just a minute or two to think...
through the purpose of an e-mail message can help you write much faster because you’ll know in advance what you want to say. And leave plenty of time to complete your documents, too; you don’t want to compromise the quality of a good message by shortchanging the important steps of revising, producing, proofreading, and distributing.2

Analyzing Your Situation

A successful message starts with a clear purpose that connects the sender’s needs with the audience’s needs. Identifying your purpose and your audience is usually a straightforward task for simple, routine messages; however, this task can be more demanding in more complex situations. For instance, if you need to communicate about a shipping problem between your Beijing and Los Angeles factories, your purpose might be simply to alert upper management to the situation, or it might involve asking the two factory managers to explore and solve the problem. These two scenarios have different purposes and different audiences; therefore, they yield dramatically different messages. If you launch directly into writing without clarifying both your purpose and your audience, you’ll waste time and energy, and you’ll probably generate a less effective message.

Defining Your Purpose

All business messages have a general purpose: to inform, to persuade, or to collaborate with your audience. This purpose helps define the overall approach you’ll need to take, from gathering information to organizing your message. Within the scope of that general purpose, each message also has a specific purpose, which identifies what you hope to accomplish with your message. State your specific purpose as precisely as possible, even identifying which audience members should respond, how they should respond, and when.

Once you have defined your specific purpose, make sure it merits the time and effort required for you to prepare and send the message. Ask these four questions:

- **Will anything change as a result of your message?** Make sure you don’t contribute to information overload by sending messages that won’t change anything. Complaining about things that you have no influence over is a good example of a message that probably shouldn’t be sent.
- **Is your purpose realistic?** If your purpose involves a radical shift in action or attitude, proceed carefully. Consider proposing a first step so that your message acts as the beginning of a learning process.
- **Is the time right?** People who are busy or distracted when they receive your message are less likely to pay attention to it.
- **Is your purpose acceptable to your organization?** Your company’s business objectives and policies, and even laws that apply to your particular industry, may dictate whether a given purpose is acceptable.

Once you are satisfied that you have a clear and meaningful purpose and that now is a smart time to proceed, your next step is to understand the members of your audience and their needs.

Developing an Audience Profile

Before an audience takes the time to read or hear your message, they need to be interested in what you’re saying. They need to see what’s in it for them—which of their needs will be met or problems will be solved by listening to your advice or doing what you ask. The more
3: Planning Business Messages

Ask yourself some key questions about your audience:

■ Who are they?
■ How many people do you need to reach?
■ How much do they already know about the subject?
■ What is their probable reaction to your message?

Project:
A report recommending that we close down the on-site exercise facility and subsidize private memberships at local health clubs.

Primary audience:
Nicole Perazzo, vice president of operations, and her supervisory team.

Size and geographic distribution:
Nine managers total; Nicole and five of her staff are here on site; three other supervisors are based in Hong Kong.

Composition:
All have experience in operations management, but several are new to the company.

Level of understanding:
All will no doubt understand the financial considerations, but the newer managers might not understand the importance of the on-site exercise facility to many of our employees.

Expectations and preferences:
Their expected firm recommendation, backed up with well-thought-out financial rationale and suggestions for communicating the bad news to employees. For a decision of this magnitude, a formal report is appropriate; e-mail distribution is expected.

Probable reaction:
From one-on-one discussions, I know that several of the managers receiving this report are active users of the on-site facility and won’t welcome the suggestion that we should shut it down. However, some nonexercisers generally think it’s a luxury the company can’t afford. Audience reactions will range from highly positive to highly negative; the report should focus on overcoming the highly negative reactions since they’re the ones I need to convince.

Audience Analysis Notes

For simple, routine messages, you usually don’t need to analyze your audience in depth. However, for complex messages or messages for indifferent or hostile audiences, take the time to study their information needs and potential reactions to your message.

If you know about your audience, their needs, and their expectations, the more effectively you’ll be able to communicate with them. For an example of the kind of information you need to compile in an audience analysis, see the planning sheet shown in Figure 3.2. To conduct an audience analysis:

■ Identify your primary audience. For some messages, certain audience members might be more important than others. Don’t ignore the needs of less influential members, but make sure you address the concerns of the key decision makers.

■ Determine audience size and geographic distribution. A message aimed at 10,000 people spread around the globe might require a different approach than one aimed at a dozen people down the hall.

■ Determine audience composition. Look for both similarities and differences in culture, language, age, education, organizational rank and status, attitudes, experience, motivations, and any other factors that might affect the success of your message.

■ Gauge audience members’ level of understanding. If audience members share your general background, they’ll probably understand your material without difficulty. If not, your message will need an element of education, and deciding how much information to include can be a challenge. Try to include only enough information to accomplish the specific purpose of your message. If the members of your audience have various levels of understanding, gear your coverage to your primary audience (the key decision makers).

■ Understand audience expectations and preferences. Will members of your audience expect complete details or just a summary of the main points? Do they want an e-mail...
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A gradual approach and plenty of evidence are required to win over a skeptical audience.

- **Forecast probable audience reaction.** As you'll read later in the chapter, audience reaction affects message organization. If you expect a favorable response, you can state conclusions and recommendations up front and offer minimal supporting evidence. If you expect skepticism, you'll probably want to introduce conclusions gradually, with more proof along the way.

### Gathering Information

With a clear picture of your audience, your next step is to assemble the information that you will include in your message. For simple messages, you may already have all the information at hand, but more complex messages can require considerable research and analysis before you're ready to begin writing. Chapter 10 explores formal techniques for finding, evaluating, and processing information, but you can often use a variety of informal techniques to gather insights and focus your research efforts:

- **Consider other viewpoints.** Putting yourself in someone else's position helps you consider what that person might be thinking, feeling, or planning.

- **Read reports and other company documents.** Your company's files may be a rich source of the information you need for a particular memo or e-mail message. Seek out annual reports, financial statements, news releases, memos, marketing reports, and customer surveys for helpful information. Find out whether your company has a knowledge management system, a centralized database that collects the experiences and insights of employees throughout the organization.

- **Talk with supervisors, colleagues, or customers.** Fellow workers and customers may have information you need, or they may know what your audience will be interested in.

- **Ask your audience for input.** If you're unsure of what audience members need from your message, ask them. Admitting you don't know but want to meet their needs will impress an audience more than guessing and getting it wrong.

### Uncovering Audience Needs

In many situations, your audience's information needs are readily apparent, such as when a consumer sends an e-mail asking a specific question. In other cases, your audience might be unable to articulate exactly what is needed. If someone makes a vague or broad request, ask questions to narrow the focus. If your boss says, “Find out everything you can about Interscope Records,” ask which aspect of the company and its business is most important. Asking a question or two often forces the person to think through the request and define more precisely what is required.

Also, try to think of information needs that your audience may not even be aware of. Suppose your company has just hired a new employee from out of town, and you've been assigned to coordinate this person's relocation. At a minimum, you would write a welcoming letter describing your company's procedures for relocating employees. With a little extra thought, however, you might include some information about the city: perhaps a guide to residential areas, a map or two, brochures about cultural activities, or information on schools and transportation. In some cases, you may be able to tell your audience something they consider important but wouldn't have thought to ask. Although adding information of this sort lengthens your message, it can also create goodwill.

### Providing Required Information

Once you've defined your audience's information needs, your next step is to satisfy those needs completely. Use the journalistic approach to make sure your information answers **who, what, when, where, why, and how**. In addition to delivering the right **quantity** of...
required information, you are responsible for verifying the quality of that information. Ask yourself these three questions:

- **Is the information accurate?** Inaccuracies can cause a host of problems, from embarrassment to serious safety and legal issues. Be sure to review any mathematical or financial calculations. Check all dates and schedules, and examine your own assumptions and conclusions to be certain they are valid.
- **Is the information ethical?** By working hard to ensure the accuracy of the information you gather, you'll also avoid many ethical problems in your messages. However, messages can also be unethical if important information is omitted or obscured.
- **Is the information pertinent?** Remember that some points will be more important to your audience than others. Moreover, by focusing on the information that concerns your audience the most, you increase your chances of sending an effective message.

### Selecting the Right Medium

Selecting the best medium for your message can make the difference between effective and ineffective communication. A medium is the form through which you choose to communicate your message. You may choose to talk with someone face-to-face, write a letter, send an e-mail message, or record a podcast—with today's ever-expanding technology, you often have a variety of media options from which to choose.

In fact, media categories have become increasingly blurred in recent years with so many options that include multimedia formats. For the sake of discussion, you can think of media as traditionally being either oral or written, and electronic media extend the reach of both. Each type of medium has advantages and disadvantages.

### Oral Media

Primary oral media include face-to-face conversations, interviews, speeches, in-person presentations, and meetings. Being able to see, hear, and react to each other can benefit communicators, giving oral media several advantages:

- They provide immediate feedback.
- They allow a certain ease of interaction.
- They involve rich nonverbal cues (both physical gestures and vocal inflections).
- They help you express the emotion behind your message.

Traditional oral media are useful for getting people to ask questions, make comments, and work together to reach a consensus or decision. However, if you don’t want or need all that interaction, then oral media can have several disadvantages:

- They restrict participation to those physically present.
- Unless recorded, they provide no permanent, verifiable record of the communication.
- They can reduce the communicator’s control over the message, if people interrupt or ask unanticipated questions.
- They often rule out the chance to revise or edit your spoken words.

### Written Media

Written messages take many forms, from traditional memos to glossy reports that rival magazines in production quality. Memos are used for the routine, day-to-day exchange of information within an organization. E-mail continues to replace traditional paper memos in many circumstances, although writers who want more formality or permanence can still opt for paper memos. Letters are written messages sent to recipients outside the organization, so in addition to conveying a particular message, they perform an important
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Written media increase your control, help you reach dispersed audiences, and minimize distortion.

The disadvantages of written media include difficulty of feedback, lack of nonverbal cues, and the time and skill sometimes required to prepare written messages.

Written media have a number of advantages over oral media:

- They allow you to plan and control your message.
- They offer a permanent, verifiable record.
- They help you reach an audience that is geographically dispersed.
- They minimize the distortion that can accompany oral messages.
- They can be used to avoid immediate interactions, including emotional confrontations when communicating controversial messages.

Disadvantages of written media include the following:

- Many are not conducive to speedy feedback.
- They lack the rich nonverbal cues provided by oral media.
- They often take more time and more resources to create and distribute.
- Elaborate printed documents can require special skills in preparation and production.

Electronic Media

Electronic media span a diverse and expanding range of technologies, from e-mail and IM to blogs and podcasts. The growth of electronic communication options is both a blessing and a curse. You have more tools than ever to choose from, but you need to choose the right tools for each message. Although no hard rules dictate which tool to use in each case, here are a few pointers that will help you determine when to select electronic over more traditional forms:

- **Telephone calls** are still the lifeblood of many organizations, for both internal and external communication. But even the humble telephone has joined the Internet age, thanks to the emerging capability to place phone calls over the Internet. Known by the technical term VoIP (which stands for Voice over IP, the Internet Protocol), Internet-based phone service promises to offer cheaper long-distance service for businesses worldwide, and companies such as Skype even offer free basic phone service between computers. Through the use of webcams, video phone service is now an inexpensive option for one-to-one phone calls, teleconferences, and online meetings.

- **Voice mail** can replace short memos and phone calls when an immediate response isn’t crucial. However, voice mail is a poor choice for lengthy, complex messages, since the information is more difficult for receivers to process.

- **Teleconferencing, videoconferencing, and online meetings** are best for informational meetings and are less effective for highly interactive meetings such as negotiation.

- **DVDs** (and to a declining extent, videotapes) are effective for sending audiovisual messages to a large number of people. With the growing availability of high-speed Internet service, many video messages once delivered on tape or disk are now delivered online.

- **Electronic documents** include both word processor files and Adobe’s widely popular Portable Document Format (PDF). Computer users can view PDFs on screen with free reader software, and PDFs are more secure and less vulnerable to viruses than word processor files.

- **Faxes** have been replaced by e-mail and PDF files in many cases, but they still play an important role in many companies. Internet-based fax services, such as eFax (www.efax.com), lower the cost by eliminating the need for a dedicated fax line and fax machine.
E-mail offers speed, low cost, portability, and convenience. It’s best for brief, noncomplex information that is time sensitive. With such a quick turnaround time, e-mail tends to be more conversational than traditional media, but not as conversational as instant messaging.

Instant messaging (IM) allows real-time, one-on-one and small-group text conversations via personal computer. At technology giant IBM, for instance, employees send more than 5 million instant messages a month. IM is more versatile than a phone call and quicker than e-mail, and newer IM systems offer file attachments, streaming audio and video, and other enhancements. Text messaging, a phone-based medium that has long been popular with consumers in Asia and Europe, is finally catching on in the United States. Although it lacks many of the capabilities of IM, text messaging does give businesses an easy way to transmit simple messages between mobile workers.

Websites and blogs have become vital communication platforms for many businesses. A well-designed website can tailor the same information for numerous readers by steering each audience group to specific sections on a website. Blogs have become common in business in recent years as communicators search for fast, informal ways to reach customers and other audiences. Video blogs (vlogs) and mobile blogs (moblogs) extend the blogging concept in intriguing new ways. Blog content is often distributed through RSS (Really Simple Syndication), which automatically sends new content to subscribers.

Podcasts are one of the newest and most exciting media choices for business communicators. Both audio and video podcasts give you a means to reach customers and colleagues with a human touch that isn’t always easy to replicate in text-only media.

You’ll read more about e-mail, IM, blogs, and podcasting in Chapter 6. As you can see, electronic messages offer considerable advantages:

- They deliver messages with great speed.
- They reach audiences physically separated from you.
- They reach a dispersed audience personally.
- They offer the persuasive power of multimedia formats.
- They can increase accessibility and openness in an organization.

For all their good points, electronic media are not problem-free. Consider some of these disadvantages:

- They can inadvertently create tension and conflict. Electronic messages can give the illusion of anonymity, so people sometimes say things online that they would never say in person or in a traditional document. Blogs have been a particularly controversial medium in this respect, with several companies firing employees for their blog postings. Many companies are still wrestling with the phenomenon of employee blogs, as they try to find the appropriate balance between protecting confidential information and corporate reputations and respecting the free-speech rights of their employees.
- They are easy to overuse. The ability to send or forward messages to multiple recipients has become a major cause of information overload.
- They expose companies to data security threats and malicious software. Connecting computers to the Internet exposes companies to a host of potential security problems, including computer viruses, information theft, and spyware (malicious software that sneaks onto personal computers to capture credit card numbers and other confidential information).
- They often lack privacy. More than a few businesspeople have discovered to their embarrassment that IMs, e-mails, and voice mails can wind up in places they never envisioned. In addition, employers can legally monitor electronic messages, and these messages can be subpoenaed for court cases.
They can seriously drain employee productivity. Employees can be easily distracted by the constant streams of e-mail, IM, voice mail, conference calls, and faxes or the temptation to surf nonbusiness-related websites during working hours.

Factors to Consider When Choosing Media

When choosing a medium for your message, select the medium that balances your needs and your audience’s needs (see Figure 3.3). Just as critical, however, is considering how your message is affected by important factors such as the following:

- **Media richness.** Richness is a medium’s ability to (1) convey a message through more than one informational cue (visual, verbal, vocal), (2) facilitate feedback, and (3) establish personal focus. The richest medium is face-to-face communication; it’s personal, it provides immediate feedback (verbal and nonverbal), and it conveys the emotion behind a message. Multimedia presentations and multimedia webpages are also quite rich. At the other extreme are the leanest media—those that communicate in the simplest ways, provide no opportunity for audience feedback, and aren’t personalized, such as memos, posters, and podcasts. Generally speaking, use the richest media to send more complex messages and to help communicate emotion. Use leaner media to send simple, routine messages.

- **Message formality.** Your media choice governs the style and tone of your message. For instance, IM and e-mail can be considered inappropriate for formal messages.

- **Media limitations.** Every medium has limitations. For example, although face-to-face communication is a rich medium, it’s one of the most restrictive because you and your
Your intentions heavily influence your choice of medium. When choosing the appropriate medium, don't forget to consider your audience's expectations. Time and cost also affect medium selection.

Good message organization helps you by reducing the time and energy needed to create messages and by making your messages more effective. Good organization helps you by helping them understand and accept your message in less time.

Sender intentions. Your choice of medium also influences audience perceptions of your intentions. For instance, to emphasize formality, use a more formal medium, such as a memo or a letter. Or, to let people know that you welcome feedback, meet face-to-face, make a phone call, or use IM.12

Audience preferences. Make sure to consider which media your audience expects or prefers.13 For example, the United States, Canada, and Germany emphasize written messages, whereas Japan emphasizes oral messages—perhaps because its high-context culture carries so much of the message in nonverbal cues and “between the lines” interpretation.14

Urgency and cost. Various media have different costs and time requirements, so you often need to balance urgency and expense. Newer media options such as blogs and podcasting make it easier to deliver messages quickly at low cost.

Once you select the best medium for your purpose, situation, and audience, you are ready to start thinking about the organization of your message.

Organizing Your Message

Misinterpreted messages waste time, lead to poor decision making, and shatter business relationships. So you can see how valuable clear writing and good organization can be.15 Successful communicators rely on good organization to make their messages meaningful.16

What exactly makes a particular organization “good”? Although the definition of good organization varies from country to country, in the United States and Canada it generally means creating a linear message that proceeds point by point (see Figure 3.4).

What does good organization do for you? First and foremost, it saves you time. Your draft goes more quickly because you’re not putting ideas in the wrong places or composing material you don’t need. In addition, you can use your organizational plan to get some advance input from your audience, making sure you’re on the right track before spending hours working on your draft. And, if your project is large and complex, you can even use your organization plan to divide the writing job among coworkers.

In addition to helping you, good organization helps your audience:

- **Good organization helps your audience understand your message.** By making your main point clear at the outset, and by stating your needs precisely, your well-organized message will satisfy your audience’s need for information.
- **Good organization helps your audience accept your message.** Even when your message is logical, you need to select and organize your points in a diplomatic way. Softening refusals and leaving a good impression enhances credibility and adds authority to your messages.
- **Good organization saves your audience time.** Audience members receive only the information they need, and because that information is relevant, brief, and logically placed, your audience can follow your thought pattern without a struggle.

You can achieve good organization by clearly defining your main idea, limiting the scope of your message, grouping supporting points, and establishing their sequence by selecting either a direct or an indirect approach.

Defining Your Main Idea

The broad subject, or topic, of every business message is condensed to one idea, whether it’s soliciting the executive committee for a larger budget or apologizing to a client for an incident of poor customer service. Your entire message supports, explains, or demonstrates your main idea—a specific statement about the topic of your message.
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FIGURE 3.4 Improving the Organization of a Message
The poorly written draft displays weak organization, while the organization is much improved in the revised version.
Before you begin to write, think about what you’re going to say and how you’re going to say it.

Poor

General Nutrition Corporation has been doing business with ComputerTime since I was hired six years ago. Your building was smaller then, and it was located on the corner of Federal Avenue and 2nd N.W. Jared Mallory, our controller, was one of your first customers. I still remember the day. It was the biggest check I’d ever written. Of course, over the years, I’ve gotten used to larger purchases.

Our department now has 15 employees. As accountants, we need to have our computers working so that we can do our jobs. The DVD recorder we bought for my assistant, Suzanne, has been a problem. We’ve taken it in for repairs three times in three months to the authorized service center, and Suzanne is very careful with the machine and hasn’t abused it. After all those repairs, it still doesn’t work right, and she’s tired of hauling it back and forth. We’re all putting in longer hours because it is our busy season, and none of us has a lot of spare time.

This is the first time we’ve returned anything to your store, and I hope you’ll agree that we deserve a better deal.

Improved

Dear Customer Service Representative:

Can you please exchange the faulty DVD record/play drive (Olympic Systems, Model PKS-2) that GNC purchased on November 15, 2006? The drive began malfunctioning soon after my assistant installed it on her computer (an HP Compaq dc5100), and we’ve had trouble with it ever since.

We took the drive to the authorized service center and were assured that the problem was merely a loose connection. The service representative fixed the drive, but in April we had to have it fixed again—another loose connection. For the next three months, the drive worked reasonably well, although the recording time was occasionally slow. Two months ago, the drive stopped working again. Once more, the service representative blamed a loose connection and made the repair. Although the drive is again operational, it occasionally makes odd noises and takes an inordinate amount of time to record a disc.

Although all the repairs have been relatively minor and have been covered by the one-year warranty, we are not satisfied with the drive. We would like to exchange it for a similar model from another manufacturer.

GNC has done business with your store for six years, and we look forward to purchasing from you in the future after this matter is resolved successfully. Please let us know your answer by September 20.

Sincerely,
Jill Saunders
Accounting Supervisor

Pointers for Good Organization
- Get to the point right away, and make the subject and purpose clear.
- Include only information that is related to the subject and purpose.
- Group related ideas and present them in a logical order.
- Include all the information your audience needs.
Your main idea may be obvious when you're preparing a brief message with simple facts that have little emotional impact on your audience. If you're responding to a request for information, your main idea may be simply, "Here is what you wanted." However, defining your main idea is more complicated when you're trying to persuade someone or when you have disappointing information to convey. In these situations, try to define a main idea that will establish a good relationship between you and your audience. In longer documents and presentations, you often need to unify a mass of material, so you'll need to define a main idea that encompasses all the individual points you want to make. Sometimes you won't even be sure what your main idea is until you sort through the information. For tough assignments like these, consider a variety of techniques to generate creative ideas:

- **Brainstorming.** Working alone or with others, generate as many ideas and questions as you can, without stopping to criticize or organize. After you capture all these pieces, look for patterns and connections to help identify the main idea and the groups of supporting ideas.

- **Journalistic approach.** The journalistic approach asks who, what, when, where, why, and how questions to distill major ideas from piles of unorganized information.

- **Question-and-answer chain.** Start with a key question, from the audience's perspective, and work back toward your message. In most cases, you'll find that each answer generates new questions, until you identify the information that needs to be in your message.

- **Storyteller's tour.** Some writers find it easier to talk through a communication challenge before they try to write. Describe what you intend to write and capture it on tape or disk. Then listen to your talk, identify ways to tighten and clarify the message, and repeat the process until you distill the main idea down to a single, concise message.

### Limiting Your Scope

The **scope** of your message is the range of information you present, the overall length, and the level of detail—all of which need to correspond to your main idea. Many business documents have a preset length limit, either from a boss's instructions, a technological limit, or a time frame such as individual speaker slots during a seminar. Even if you don't have a preset limit, it's vital to limit yourself to the scope needed to convey your message—and no more.

Whatever the length of your message, limit the number of major support points to half a dozen or so—and if you can get your idea across with fewer points, all the better. Listing 20 or 30 support points might feel as if you're being thorough, but your audience will view such detail as rambling and mind-numbing. Instead, look for ways to group supporting points under major headings, such as finance, customers, competitors, employees, or whatever is appropriate for your subject. You may need to refine your major support points so that you have a smaller number with greater impact.

If your message is brief (say, a 4-minute speech or a 1-page letter), plan on only 1 minute or one paragraph each for the introduction, conclusion, and major points. Because the amount of evidence you can present is limited, your main idea will have to be both easy to understand and easy to accept. However, if your message is long (say, 60 minutes or 20 pages), you can develop the major points in considerable detail. You can spend about 10 minutes or 10 paragraphs (more than 3 pages of double-spaced, typewritten text) on each of your key points, and you'll still have room for your introduction and conclusion.

### Choosing Between Direct and Indirect Approaches

After you've defined your ideas, you're ready to decide on the sequence you will use to present your points. You have two basic options:

- **Direct approach (deductive).** When you know your audience will be receptive to your message, start with the main idea (such as a recommendation, a conclusion, or a request), and follow that with your supporting evidence.
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FIGURE 3.5 Choosing Between the Direct and Indirect Approaches
Think about the way your audience is likely to respond before choosing your approach.

<table>
<thead>
<tr>
<th>Audience Reaction</th>
<th>Direct approach</th>
<th>Indirect approach</th>
</tr>
</thead>
<tbody>
<tr>
<td>Eager/interested/pleased-neutral</td>
<td>Eager/interested/pleased-neutral</td>
<td>Displeased</td>
</tr>
<tr>
<td>Message Opening</td>
<td>Start with the main idea, the request, or the good news.</td>
<td>Start with a neutral statement that acts as a transition to the reasons for the bad news.</td>
</tr>
<tr>
<td>Message Body</td>
<td>Provide necessary details.</td>
<td>Give reasons to justify a negative answer. State or imply the bad news, and make a positive suggestion.</td>
</tr>
<tr>
<td>Message Close</td>
<td>Close with a cordial comment, a reference to the good news, or a statement about the specific action desired.</td>
<td>Close cordially.</td>
</tr>
</tbody>
</table>

Indirect approach (inductive). When your audience will be skeptical about or even resistant to your message, start with the evidence first and build your case before presenting the main idea.

To choose between these two alternatives, analyze your audience’s likely reaction to your purpose and message. Bear in mind, however, that each message is unique. No simple formula will solve all your communication problems. For example, although an indirect approach may be best when you’re sending bad news to outsiders, if you’re writing a memo to an associate, you may want to get directly to the point, even if your message is unpleasant. The direct approach might also be a good choice for long messages, regardless of your audience’s attitude—because delaying the main idea could cause confusion and frustration. Figure 3.5 summarizes how your approach may differ depending on the likely audience reaction. The type of message also influences the choice of a direct or indirect approach. In the coming chapters, you’ll get specific advice on choosing the best approach for a variety of different communication challenges.

Outlining Your Content

Once you have chosen the right approach, it’s time to figure out the most logical and effective way to provide your supporting details. Even if you’ve resisted creating outlines in your school assignments over the years, try to get into the habit when you’re preparing business documents and presentations. You’ll save time, get better results, and do a better job of navigating through complicated business situations. Whether you use a specialized outlining and idea-mapping software, use the outlining features provided with word-processing software, or simply jot down three or four points on paper, making a plan and sticking to it will help you cover the important details.

You’re no doubt familiar with the basic outline formats that identify each point with a number or letter and that indent certain points to show which ones are of equal status.
A good outline divides a topic into at least two parts, restricts each subdivision to one category, and ensures that each subdivision is separate and distinct (see Figure 3.6).

Whichever outlining or organizing scheme you use, start your message with the main idea, follow that with major supporting points, and then illustrate these points with evidence:

- **Start with the main idea.** The main idea helps you establish the goals and general strategy of the message, and it summarizes two things: (1) what you want your audience to do or think and (2) why they should do so. Everything in your message either supports the main idea or explains its implications.

- **State the major points.** Now it’s time to support your main idea with the major points that clarify and explain your ideas in more concrete terms. If your purpose is to inform, your major points might be based on something physical or financial, for instance. When you’re describing a process, the major points are almost inevitably steps in the process. When you’re describing an object, the major points correspond to the components of the object. When you’re giving a historical account, major points represent events in the chronological chain. If your purpose is to persuade or to collaborate, select major points that develop a line of reasoning or a logical argument that proves your central message and motivates your audience to act.

- **Illustrate with evidence.** After you’ve defined the main idea and identified supporting points, you’re ready to illustrate each point with specific evidence that helps audience members understand and remember the more abstract concepts you’re presenting.

Up to a point, the more evidence you provide, the more conclusive your case will be. If your subject is complex and unfamiliar, or if your audience is skeptical, you’ll need a lot of facts and figures to demonstrate your points. On the other hand, if your subject is routine and your audience is positively inclined, you can be more sparing with the evidence. You want to provide enough support to be convincing but not so much that your message becomes boring or difficult to read.
2: The Three-Step Writing Process

Document Makeover

Improve This Letter

To practice correcting drafts of actual documents, visit your online course or the access-code-protected portion of the Companion Website. Click “Document Makeovers,” then click Chapter 3. You will find a letter that contains problems and errors relating to what you’ve learned in this chapter about planning and organizing business messages. Use the Final Draft decision tool to create an improved version of this letter. Check the document for audience focus, the right choice of medium, and the proper choice of direct or indirect approach.

process, which includes four planning tasks. The first of these is analyzing your situation, which includes defining both a general and a specific purpose and developing a profile of your audience by identifying the primary audience, determining audience size, determining audience composition, gauging your audience’s level of understanding, projecting your audience’s expectations and preferences, and estimating your audience’s probable reaction. The second task is gathering necessary information by exploring audience needs then collecting information that will meet those needs. The third task is selecting the right medium; the chapter offered an overview of oral, written, and electronic media. The fourth and final task is how to organize your message by defining the main idea, limiting the scope, grouping your points, choosing the direct or indirect approach, then crafting an outline.

The next chapter focuses on the second step of the writing process: writing business messages. There you’ll explore two major tasks, adapting to your audience by being sensitive to their needs and building a strong relationship with them and then composing your messages. You will learn about controlling your style and tone, selecting the best words, creating effective sentences, and developing coherent paragraphs.

Test Your Knowledge

1. What are the three steps in the writing process?

2. What two types of purposes do all business messages have?
3. What do you need to know in order to develop an audience profile?

4. When including information in your message, what three conditions must you satisfy?

5. What are the main advantages of oral media? Of written media?

---

**Apply Your Knowledge**

1. Some writers argue that planning messages wastes time because they inevitably change their plans as they go along. How would you respond to this argument? Briefly explain.

2. As a member of the public relations department, which medium (or media) would you recommend using to inform the local community that your toxic-waste cleanup program has been successful? Justify your choice.

3. Would you use a direct or an indirect approach to ask employees to work overtime to meet an important deadline? Please explain.

4. Considering how fast, easy, inexpensive, they are, should e-mail, instant messages, blogs, and podcasts completely replace meetings and other face-to-face communication in your company? Why or why not?
5. Ethical Choices  The company president has asked you to draft a memo for her signature to the
board of directors, informing them that sales in the new line of gourmet fruit jams have far
exceeded anyone’s expectations. As a member of the purchasing department, you happen to
know that sales of moderately priced jams have declined quite a bit (many customers have
switched to the more expensive jams). You were not directed to add that tidbit of information.
Should you write the memo and limit your information to the expensive gourmet jams?
Or should you include the information about the decline in moderately priced jams? Please
explain.

Practice Your Knowledge

Exercises for Perfecting Your Writing

Specific Purpose  For each of the following communication tasks, state a specific pur-
pose (if you have trouble, try beginning with “I want to . . .”).

1. A report to your boss, the store manager, about the outdated items in the warehouse
2. A blog posting (on your external website) to customers and the news media about
   your company’s plans to acquire a competitor
3. A letter to a customer who hasn’t made a payment for three months
4. An e-mail message to employees about the office’s high water bills
5. A phone call to a supplier checking on an overdue parts shipment
6. A podcast to new users of the company’s online content management system

Audience Profile  For each communication task below, write brief answers to three
questions: (1) Who is my audience? (2) What is my audience’s general attitude toward my
subject? (3) What does my audience need to know?

7. A final-notice collection letter from an appliance manufacturer to an appliance
dealer, sent ten days before initiating legal collection procedures
8. A promotional message on your company’s e-retailing website, announcing a tempo-
rary price reduction on high-definition television sets
9. An advertisement for peanut butter
10. A letter to the property management company responsible for maintaining your
    office building, complaining about persistent problems with the heating and air con-
    ditioning
11. A cover letter sent along with your résumé to a potential employer
12. A request (to the seller) for a price adjustment on a piano that incurred $150 in dam-
    age during delivery to a banquet room in the hotel you manage
Media and Purpose  List three messages you have read, viewed, or listened to lately (such as direct-mail promotions, letters, e-mail or instant messages, phone solicitations, podcasts, and lectures). For each message, determine the general and the specific purpose; then answer the questions listed.

Message #1:
13. General purpose:
14. Specific purpose:
15. Was the message well timed?
16. Did the sender choose an appropriate medium for the message?
17. Was the sender’s purpose realistic?

Message #2:
18. General purpose:
19. Specific purpose:
20. Was the message well timed?
21. Did the sender choose an appropriate medium for the message?
22. Was the sender’s purpose realistic?

Message #3:
23. General purpose:
24. Specific purpose:
25. Was the message well timed?
26. Did the sender choose an appropriate medium for the message?
27. Was the sender’s purpose realistic?

Message Organization: Choosing the Approach  Indicate whether the direct or the indirect approach would be best in each of the following situations. Write direct or indirect in the space provided.

28. _____ An e-mail message to a car dealer asking about the availability of a specific make and model of car
29. _____ A letter from a recent college graduate requesting a letter of recommendation from a former instructor
30. _____ A letter turning down a job applicant
31. _____ A blog posting explaining that because of high air-conditioning costs, the plant temperature will be held at 78 degrees during the summer
32. _____ A final request to settle a delinquent debt
Message Organization: Drafting Persuasive Messages  If you were trying to persuade people to take the following actions, how would you organize your argument? Write direct or indirect in the space provided.

33. _____ You want your boss to approve your plan for hiring two new people.
34. _____ You want to be hired for a job.
35. _____ You want to be granted a business loan.
36. _____ You want to collect a small amount from a regular customer whose account is slightly past due.
37. _____ You want to collect a large amount from a customer whose account is seriously past due.

Activities

For active links to all websites discussed in this chapter, visit this text’s website at www.prenhall.com/bovee. Locate your book and click on its Companion Website link. Then select Chapter 3, and click on “Featured Websites.” Locate the name of the page or the URL related to the material in the text. Please note that links to sites that become inactive after publication of the book will be removed from the Featured Websites section.

1. Analyze This Document  A writer is working on an insurance information brochure and is having trouble grouping the ideas logically into an outline. Prepare the outline, paying attention to appropriate subordination of ideas. If necessary, rewrite phrases to give them a more consistent sound.

Accident Protection Insurance Plan

- Coverage is only pennies a day
- Benefit is $100,000 for accidental death on common carrier
- Benefit is $100 a day for hospitalization as result of motor vehicle or common carrier accident
- Benefit is $20,000 for accidental death in motor vehicle accident
- Individual coverage is only $17.85 per quarter; family coverage is just $26.85 per quarter
- No physical exam or health questions
- Convenient payment—billed quarterly
- Guaranteed acceptance for all applicants
- No individual rate increases
- Free, no-obligation examination period
- Cash paid in addition to any other insurance carried
- Covers accidental death when riding as fare-paying passenger on public transportation, including buses, trains, jets, ships, trolleys, subways, or any other common carrier
- Covers accidental death in motor vehicle accidents occurring while driving or riding in or on automobile, truck, camper, motor home, or nonmotorized bicycle

2. Message Planning Skills: Self-Assessment  How good are you at planning business messages? Use the following chart to rate yourself on each of the following elements of planning an audience-centered business message. Then examine your ratings to identify where you are strongest and where you can improve.
## 3: Planning Business Messages

<table>
<thead>
<tr>
<th>Element of Planning</th>
<th>Always</th>
<th>Frequently</th>
<th>Occasionally</th>
<th>Never</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. I start by defining my purpose.</td>
<td>_____</td>
<td>_____</td>
<td>_____</td>
<td>_____</td>
</tr>
<tr>
<td>2. I analyze my audience before writing a message.</td>
<td>_____</td>
<td>_____</td>
<td>_____</td>
<td>_____</td>
</tr>
<tr>
<td>3. I investigate what my audience wants to know.</td>
<td>_____</td>
<td>_____</td>
<td>_____</td>
<td>_____</td>
</tr>
<tr>
<td>4. I check that my information is accurate, ethical, and pertinent.</td>
<td>_____</td>
<td>_____</td>
<td>_____</td>
<td>_____</td>
</tr>
<tr>
<td>5. I consider my audience and purpose when selecting media.</td>
<td>_____</td>
<td>_____</td>
<td>_____</td>
<td>_____</td>
</tr>
<tr>
<td>6. I consider the audience's likely reaction to my message before deciding on a direct or indirect approach.</td>
<td>_____</td>
<td>_____</td>
<td>_____</td>
<td>_____</td>
</tr>
<tr>
<td>7. I plan carefully, particularly for longer or complex messages, to make sure I use my time wisely.</td>
<td>_____</td>
<td>_____</td>
<td>_____</td>
<td>_____</td>
</tr>
<tr>
<td>8. I limit the scope of my messages to the extent of information needed to accomplish my specific purpose.</td>
<td>_____</td>
<td>_____</td>
<td>_____</td>
<td>_____</td>
</tr>
</tbody>
</table>

## Expand Your Knowledge

### Exploring the Best of the Web

#### Learn from the Best in the Business
See how some of today’s brightest entrepreneurs and business managers are using blogging to reach their target markets. *Forbes* magazine regularly highlights business-oriented blogs that its editors believe make effective use of the unique benefits of blogging. At the [www.forbes.com/bow](http://www.forbes.com/bow) page, click on “Blogs” in the “Departments” heading, then check out the Marketing and Small Business blogging sections.

### Exercises

1. What are some of the reasons *Forbes* selected these particular blogs as being among the best on the web?
2. What weaknesses does the magazine see in some of these blogs?
3. What can you learn from these blogs that you could apply to your own future as an entrepreneur or business manager?

### Exploring the Web on Your Own
Review these chapter-related websites on your own to learn more about achieving communication success in the workplace:

2. See how to put phone text messaging to work in business applications at Text.It, [www.text.it](http://www.text.it) (click on “Text for Business”).
3. Discover how e-mail works and how to improve your e-mail communications by following the steps at About Internet for Beginners—Harness E-Mail, [www.learnthenet.com/english/section/email.html](http://www.learnthenet.com/english/section/email.html).
Learn Interactively

Interactive Study Guide

Visit www.prenhall.com/bovee, then locate your book and click on its Companion Website link. Select Chapter 3 to take advantage of the interactive “Chapter Quiz” to test your knowledge of chapter concepts. Receive instant feedback on whether you need additional studying. Also, visit the “Study Hall,” where you’ll find an abundance of valuable resources that will help you succeed in this course.

Peak Performance Grammar and Mechanics

If your instructor has required the use of “Peak Performance Grammar and Mechanics,” either in your online course or on CD, you can improve your skill with verbs by using the “Peak Performance Grammar and Mechanics” module. Click on “Grammar Basics,” and then click “Verbs.” Take the Pretest to determine whether you have any weak areas. Then review those areas in the Refresher Course. Take the Follow-Up Test to check your grasp of verbs. For an extra challenge or advanced practice, take the Advanced Test. Finally, for additional reinforcement in verbs, go to the “Improve Your Grammar, Mechanics, and Usage” section that follows, and complete the “Level I: Self-Assessment” exercises.

Improve Your Grammar, Mechanics, and Usage

Level 1: Self-Assessment—Verbs

Review Section 1.3 in the Handbook of Grammar, Mechanics, and Usage, and then complete the following 15 items.

In items 1–5, provide the verb form called for in the following exercises:

1. I ________ (present perfect, become) the resident expert on repairing the copy machine.
2. She ________ (past, know) how to conduct an audit when she came to work for us.
3. Since Joan was promoted, she ________ (past perfect, move) all the files to her office.
4. Next week, call John to tell him what you ________ (future, do) to help him set up the seminar.
5. By the time you finish the analysis, he ________ (future perfect, return) from his vacation.

For items 6–10, rewrite the sentences so that they use active voice instead of passive:

6. The report will be written by Leslie Cartwright.
7. The failure to record the transaction was mine.
8. Have you been notified by the claims department of your rights?
9. We are dependent on their services for our operation.
10. The damaged equipment was returned by the customer before we even located a repair facility.

In items 11–15, circle the correct verb form provided in parentheses:

11. Everyone upstairs (receive/receives) mail before we do.
12. Neither the main office nor the branches (is/are) blameless.
13. C&B sales (is/are) listed in the directory.
14. When measuring shelves, 7 inches (is/are) significant.
15. About 90 percent of the employees (plant/plans) to come to the company picnic.
Level 2: Workplace Applications

The following items contain numerous errors in grammar, capitalization, punctuation, abbreviation, number style, word division, and vocabulary. Rewrite each sentence in the space provided, correcting all errors. Write C in the space after any sentence that is already correct.

1. Cut two inches off trunk and place in a water stand, and fill with water.

C

2. The newly-elected officers of the Board are: John Rogers, president, Robin Doig, vice-president, and Mary Sturhann, secretary.

C

3. Employees were stunned when they are notified that the trainee got promoted to Manager only after her 4th week with the company.

C

4. Seeking reliable data on U.S. publishers, Literary Marketplace is by far the best source.

C

5. Who did you wish to speak to?

C

6. The keynote address will be delivered by Seth Goodwin, who is the author of six popular books on marketing, has written two novels, and writes a column for “Fortune” magazine.

C

7. Often the reputation of an entire company depend on one employee that officially represents that company to the public.

C
8. The executive director, along with his staff, are working quickly to determine who should receive the Award.

9. Him and his co-workers, the top bowling team in the tournament, will represent our Company in the league finals on Saturday.

10. Listening on the extension, details of the embezzlement plot were overheard by the Security Chief.

11. The acceptance of visa cards are in response to our customer’s demand for a more efficient and convenient way of paying for parking here at San Diego International airport.

12. The human resources dept. interviewed dozens of people, they are seeking the better candidate for the opening.

13. Libraries’ can be a challenging; yet lucrative market if you learn how to work the “system” to gain maximum visibility for you’re products and services.

14. Either a supermarket or a discount art gallery are scheduled to open in the Mall.

15. I have told my supervisor that whomever shares my office with me cannot wear perfume, use spray deodorant, or other scented products.
Level 3: Document Critique

The following document may contain errors in grammar, capitalization, punctuation, abbreviation, number style, vocabulary, and spelling. You will also find errors relating to topics in this chapter. Concentrate on using the "you" attitude, emphasizing the positive, being polite, and using bias-free language as you improve this memo. Correct all errors using standard proofreading marks (see Appendix C).

Memo

TO: Blockbuster mgrs.

FROM: Tom Dooley, deputy chairman, Viacom, Inc.

in care of Blockbuster Entertainment Group

Corporate headquarters, Renaissance Tower

1201 Elm street; Dallas TX 75270

DATE: May 8 2007

SUB: Recent Cash Flow and consumer response—Survey

Now that our stores have been re-organized with your hard work and cooperation, we hope revenues will rise to new heights; if we re-emphasize video rentals as Blockbuster’s core business and reduce the visibility of our sideline retail products. Just in case though, we want to be certain that these changes are having the positive affect on our cash flow that we all expect and look forward to.

To help us make that determination, respond to the following survey questions and fax them back. Answer concisely; but use extra paper if necessary—for details and explanations.

When you finish the survey it will help headquarters improve service to you; but also, help us all improve service to our customers. Return your survey before before May 15 to my attention. Then blockbuster hopefully can thrive in a marketplace, that critics say we cannot conquer. Blockbuster must choose wisely and serve its customers well in a difficult video-rental business environment.

Times are very tough but if we work hard at it its possible we might make Blockbuster ‘the man on the streets’ favorite ‘place to go to rent videos!’