

**PART V**

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**Ninety Million Americans  
Lack Health Literacy**

Technical language and arcane terminology cause nearly half of American adults to face higher risks of health problems, the Institute of Medicine has recently reported (Neergaard). Even educated readers have trouble with medical jargon, but for millions who don't read well or aren't fluent in English, the problems are compounded. Such people face what the Institute report calls "limited health literacy," and they have problems following instructions on drug labels, interpreting hospital consent forms, and understanding a doctor's diagnosis.

The American Medical Association has sponsored efforts to improve doctors' ability to communicate with patients, but most doctors would be "stunned" if they actually quizzed patients about what they understood after a visit. The Institute report makes a number of recommendations, including government-sponsored research on ways to improve health literacy and a requirement that health organizations and medical schools teach health literacy and patient communication. ♦

# **17**

## **Memo Reports and Electronic Mail**

INFORMATIONAL VERSUS ANALYTICAL REPORTS

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## INFORMATIONAL VERSUS ANALYTICAL REPORTS

In the professional world, decision makers rely on two broad types of reports: Some reports focus primarily on *information* (“what we’re doing now,” “what we did last month,” “what our customer survey found,” “what went on at the department meeting”). But beyond merely providing information, many reports also include *analysis* (“what this information means for us,” “what courses of action should be considered,” “what we recommend, and why”).

Analysis is the heart of technical communication: It involves evaluating your information, interpreting it accurately, drawing valid conclusions, and making persuasive recommendations. Although gathering and reporting information are invaluable workplace skills, *analysis* is ultimately what professionals largely do to earn their pay. And the results of any detailed analysis almost invariably get recorded in a written report. Chapter 24 covers formal analytical reports.

## FORMAL VERSUS INFORMAL REPORTS

For every long (formal) report, countless short (informal) reports lead to informed decisions on matters as diverse as the most comfortable office chairs to buy or the best recruit to hire for management training. Unlike long reports (pages 606–40), most short reports require no extended planning, are quickly prepared, contain little or no background information, and have no front or end matter (title page, table of contents, glossary, etc.). But despite their conciseness, short reports do provide the information and analysis that readers need.

Although various formats can be used, short reports often take the form of a memorandum.

## PURPOSE OF MEMO REPORTS

Memos, the major form of communication in most organizations, leave a *paper trail* of directives, inquiries, instructions, requests, and recommendations, and daily reports for future reference.

Despite the explosive growth of email, paper memos continue to be used widely, especially when an email would be considered too informal or when the message is lengthy. (See page 405 for guidelines.) Different organizations have different preferences about paper memos versus email (Gurak and Lannon 189).

**NOTE** *Email memos leave their own trail. Although generally less formal and more quickly written than paper documents, email messages are saved in both hard copy and online—and can inadvertently be forwarded to someone never intended to receive or read them.*

Organizations rely on memos to trace decisions and responsibilities, track progress, and recheck data. Therefore, any memo you write can have far-reaching ethical and legal implications. Be sure your memo includes the date and your initials or signature. Also make sure that your information is specific, unambiguous, and accurate.

## **ELEMENTS OF A USABLE MEMO**

A usable memo is easy to scan, file, and retrieve. The paper memo has a header that names the organization and identifies the sender, recipient, subject (often in caps or underlined for emphasis), and date. (Placement of these items may differ among firms.) Other memo elements are summarized in Figure 17.1.

## **INTERPERSONAL CONSIDERATIONS IN WRITING A MEMO**

A form of “in-house” correspondence, memos circulate among colleagues, subordinates, and superiors to address questions like these:

- *What are we doing right, and how can we do it better?*
- *What are we doing wrong, and how can we improve?*
- *Who’s doing what, and when, and where?*

Memo topics often involve evaluations or recommendations about policies, procedures, and, ultimately, the *people with whom we work*.

Because people are sensitive to criticism (even when it is merely implied) and often resistant to change, an ill-conceived or aggressive memo can spell disaster for its author. Consider, for instance, this evaluation of one company’s training program for new employees:

No one tells new employees what it’s *really* like to work here—how to survive politically: for example, never tell anyone what you *really* think; never observe how few women are in management positions, or how disorganized things seem to be. New employees shouldn’t have to learn these things the hard way. We need to demand clearer behavioral objectives.

Instead of emphasizing deficiencies, the following version focuses on the *benefits* of change:

New employees would benefit from a concrete guide to the personal and professional traits expected in our company. Training sessions could be based on the attitudes, manners, and behavior appropriate in business settings.

Here are some common mistakes that can offend coworkers:

- *Griping or complaining.* Everyone has problems of their own. Never complain without suggesting a solution.
- *Being too critical or judgmental.* Making someone look bad means making an enemy.
- *Being too bossy.* The imperative mood is best reserved for instructions.
- *Neglecting to provide a copy to each appropriate person.* No one appreciates being left “out of the loop.”

Before releasing any memo designed to influence people’s thinking, review Chapter 4 carefully.

**NOTE**      *Busy people are justifiably impatient with any memo that seems longer than it needs to be or that contains typos or grammar and spelling errors. Use your spelling and grammar checker, but also proofread carefully. (See page 24 for proofreading guidelines.)*

## **DIRECT VERSUS INDIRECT ORGANIZING PATTERNS**

In planning a memo, you can choose from two basic organizing patterns. First is the *direct* pattern, in which you begin with your main point (your request, recommendation, or position on the issue) and then present the details or analysis supporting your case. The second pattern is *indirect*, in which you lay out the details of your case before delivering the bottom line.

Readers generally prefer the direct approach, especially for analytical reports, because they can get right to your main point. For example, if the Payroll Division of a large company has to announce to employees that weekly paychecks will be delayed because of a virus in the computer system, a direct approach would be appropriate. But when you need to convey bad news or make an unpopular request or recommendation (as in asking for a raise or announcing employee layoffs), you might consider an indirect approach so that you can present your case first. The danger of an indirect approach, however,

is that readers could think you are being evasive. For more on direct versus indirect organizing patterns, see page 420.

### **Informational Reports in Memo Form**

Among the informational reports that help keep organizations running from day to day are progress reports, periodic activity reports, and meeting minutes.

#### **Progress Reports**

Many organizations depend on progress reports (also called status reports) to track activities, problems, and progress on various projects. Some professions require regular progress reports (daily, weekly, monthly), while others only use such reports as needed for a specific project or task. Daily progress reports are vital in a business that assigns crews to many projects.

Managers often rely on progress reports to decide how to allocate funds. Managers also need to know about delays that could slow a project and increase costs. Also managers need information in order to coordinate the efforts of various groups working on a project.

When, say, construction work is performed for a client, regular reports spell out for the client (and investors and loan officers) how time and money are being spent and how problems and setbacks are being addressed. Such reports therefore can help predict whether the project will be completed on schedule and within budget. Many contracts stipulate the dates and stages at which progress will be reported. Failing to report on time may incur legal penalties.

Often, a progress report is one of a series. Together, the project proposal (Chapter 23), progress reports (the number varies with the scope and length of the project), and the final report (Chapter 24) provide a record and history of the project.

To meet managers' and clients' needs, progress reports must answer these questions:

- *How much has been accomplished since the last report?*
- *Is the project on schedule?*
- *If not, what went wrong?*
- *How was the problem corrected?*
- *How long will it take to get back on schedule?*
- *What else needs to be done?*
- *What is the next step?*
- *Have you encountered any unexpected developments?*



- *When do you anticipate completion? Or (on a long project) when do you anticipate completion of the next phase?*

If the report is part of a series, you might also refer to prior problems or developments.

Many organizations have forms for organizing progress reports, so no one format is best. But each report in a series should be organized identically. The following memo illustrates how one writer organized her report.

## **PROGRESS REPORT (ON THE JOB)**

### MEMORANDUM

To: P. J. Stone, Senior Vice President  
From: B. Poret, Group Training Manager  
Date: June 6, 20xx  
Subject: *Progress Report: Training Equipment for New Operations Building*

### **Work Completed**

Our training group has met twice since our May 12 report in order to answer the questions you posed in your May 16 memo. In our first meeting, we identified the types of training we anticipate.

### **Types of Training Anticipated**

- Divisional Surveys
- Loan Officer Work Experience
- Divisional Systems Training
- Divisional Clerical Training (Continuing)
- Divisional Clerical Training (New Employees)
- Divisional Management Training (Seminars)
- Special/New Equipment Training

In our second meeting, we considered various areas for the training room.

### **Training Room**

The frequency of training necessitates having a training room available daily. The large training room in the Corporate Education area (10th floor) would be ideal. Before submitting our next report, we need your confirmation that this room can be assigned to us.

To support the training programs, we purchased this equipment:

- Audioviewer
- LCD monitor
- Videocassette recorder and monitor
- CRT
- Software for computer-assisted instruction
- Slide projector
- Tape recorder

This equipment will allow us to administer training in a variety of modes, ranging from programmed and learner-controlled instruction to group seminars and workshops.

### **Work Remaining**

To support the training, we need to furnish the room appropriately. Because the types of training will vary, the furniture should provide a flexible environment. Outlined here are our anticipated furnishing needs.

- Tables and chairs that can be set up in many configurations. These would allow for individual or group training and large seminars.
- Portable room dividers. These would provide study space for training with programmed instruction, and allow for simultaneous training.
- Built-in storage space for audiovisual equipment and training supplies. Ideally, this storage space should be multipurpose, providing work or display surfaces.
- A flexible lighting system, important for audiovisual presentations and individualized study.
- Independent temperature control, to ensure that the training room remains comfortable regardless of group size and equipment used.

The project is on schedule. As soon as we receive your approval of these specifications, we will proceed to the next step: sending out bids for room dividers, and having plans drawn for the built-in storage space.

cc. R. S. Pike, SVP  
G. T. Bailey, SVP

As you work on a longer report or term project, your instructor might require a progress report. In this next memo, Karen Granger documents her progress on her term project: an evaluation of the Environmental Protection Agency's effectiveness in cleaning a heavily contaminated harbor.

## **PROGRESS REPORT ON TERM PROJECT**

### **Progress Report**

To: Dr. John Lannon  
From: Karen P. Granger  
Date: April 17, 20xx  
Subject: Evaluation of the EPA's *Remedial Action Master Plan*

### **Project Overview**

As my term project, I have been evaluating the issues of politics, scheduling, and safety surrounding the EPA's published plan to remove PCB contaminants from New Bedford Harbor.

### **Work Completed**

February 23: Began general research on the PCB contamination of the New Bedford Harbor.

March 8: Decided to analyze the *Remedial Action Master Plan* (RAMP) in order to determine whether residents are being "studied to death" by the EPA.

March 9–19: Drew a map of the harbor to show areas of contamination. Obtained the RAMP from Pat Shay of the EPA.  
Interviewed Representative Grimes briefly by phone; made an appointment to interview Grimes and Sharon Dean

on April 13. Interviewed Patricia Chase, President of the New England Sierra Club, briefly by phone.

March 24: Obtained *Public Comments on the New Bedford RAMP*, a collection of reactions to the plan.

April 13: Interviewed Grimes and Dean; searched Grimes's files for information. Also searched the files of Raymond Soares, New Bedford Coordinator, EPA.

### **Work in Progress**

Contacting by telephone the people who commented on the RAMP.

### **Work to Be Completed**

April 25: Finish contacting commentators on the RAMP.

April 26: Interview an EPA representative about the complaints that the commentators raised on the RAMP.

Date for Completion: May 3, 20xx

### **Complications**

The issue of PCB contamination is complicated and emotional. The more I uncovered, the more difficult I found it to remain impartial in my research and analysis. As a New Bedford resident, I expected to find that we are indeed being studied to death; because my research seems to support my initial impression, I am not sure I have remained impartial.

Lastly, the people I talk to do not always have the time to answer all my questions. Everyone, however, has been interested and encouraging, if not always informative.

## **Periodic Activity Reports**

The periodic activity report resembles the progress report in that it summarizes activities over a specified time frame. But unlike progress reports, which summarize specific accomplishments on a given *project*, periodic reports summarize general activities during a given *period*.

Manufacturers requiring periodic reports often have prepared forms, because most of their tasks are quantifiable (e.g., units produced). But most white-collar jobs do not lend themselves to prepared-form reports. You may have to develop your own format, as the next writer does.

Fran DeWitt's report answers her boss's primary question: *What did you accomplish last month?* Her response has to be detailed and informative.

## **PERIODIC ACTIVITY REPORT**

Date: 6/18/xx  
To: N. Morgan, Assistant Vice President  
From: F. C. DeWitt  
Subject: **Recent Meetings for Computer-Assisted Instruction**

For the past month, I've been working on a cooperative project with the Banking Administration Institute, Computron Corporation, and several banks. My purpose has been to develop training programs, specific to banking, appropriate for computer-assisted instruction (CAI).

We have focused on three major areas: Proof/Encoding Training, Productivity Skills for Management, and Banking Principles.

I hosted two meetings for this task force. On June 6, we discussed Proof/Encoding Training, and on June 7, Productivity Training. The objective for the Proof/Encoding meeting was to compare ideas, information, and current training packages available on this topic. We are now designing a training course.

The objective of the meeting on Productivity was to discuss skills that increase productivity in banking (specifically Banking Operations). Discussion included instances in which computer-assisted instruction is appropriate for teaching productivity skills. Computron also discussed computer applications used to teach productivity.

On June 10, I attended a meeting in Washington, D.C., to design a course in basic banking principles for high-level clerical/supervisory-level employees. We also discussed the feasibility of adapting this course to CAI. This type of training, not currently available through Corporate Education, would meet a definite supervisor/management need in the division.

My involvement in these meetings has two benefits. First, structured discussions with trainers in the banking industry provide an exchange of ideas, methods, and experiences. This involvement expedites development of our training programs because it saves me time on research. Second, automation will continue to affect future training practices. With a working knowledge of these systems and their applications, I now am able to assist my group in designing programs specific to our needs.

Employees use periodic reports to inform management of what they are doing and how well they are doing it. Therefore, accuracy, clarity, and appropriate level of detail are important—as is the persuasive (and ethical) dimension. Make sure that recipients have all the necessary facts—and that they understand these facts as clearly as you do.

### **Meeting Minutes**

Many team or project meetings require someone to record the proceedings. Minutes are the records of such meetings. Copies of minutes usually are distributed (often via email) to all members and interested parties, to track the proceedings and to remind members of their designated responsibilities. The appointed secretary records the minutes.

When you record minutes, answer these questions:

- *What group held the meeting? When, where, and why?*
- *Who chaired the meeting? Who else was present?*
- *Were the minutes of the last meeting approved (or disapproved)?*
- *Who said what?*
- *Was anything resolved?*
- *Who made which motions and what was the vote? What discussion preceded the vote?*
- *Who was given responsibility for which tasks?*

Minutes are filed as part of an official record, and so must be precise, clear, highly informative, and free of the writer's personal commentary ("As usual, Ms. Jones disagreed with the committee") or judgmental words ("good," "poor," "irrelevant").

## MEETING MINUTES

Subject: **Minutes of Managers' Meeting, October 5, 20xx**

### **Members Present**

Harold Tweeksbury, Jeannine Boisvert, Sheila DaCruz, Ted Washington, Denise Walsh, Cora Parks, Cliff Walsh, Joyce Capizolo

### **Agenda**

1. The meeting was called to order on Wednesday, October 5, at 10 A.M. by Cora Parks.
2. The minutes of the September meeting were approved unanimously.
3. The first order of new business was to approve the following policies for the Christmas season:
  - a. Temporary employees should list their ID numbers in the upper-left corner of their receipt envelopes to help verification. Discount Clerical assistant managers will be responsible for seeing that this procedure is followed.
  - b. When temporary employees turn in their envelopes, personnel from Discount Clerical should spot-check them for completeness and legibility. Incomplete or illegible envelopes should be corrected, completed, or rewritten. *Envelopes should not be sealed.*
4. Jeannine Boisvert moved that we also hold one-day training workshops for temporary employees in order to teach them our policies and procedures.

The motion was seconded. Joyce Capizolo disagreed, saying that on-the-job training (OJT) was enough. The motion for the training session carried 6–3.

The first workshop, which Jeannine agreed to arrange, will be held October 25.
5. Joyce Capizolo requested that temporary employees be sent a memo explaining the temporary employee discount procedure. The request was converted to a motion and seconded by Cliff Walsh. The motion passed by a 7–2 vote.
6. Cora Parks adjourned the meeting at 11:55 A.M.

Different organizations often have templates or special formats for recording minutes.

## **ANALYTICAL REPORTS IN MEMO FORM**

Analytical reports not only provide information, but also present an *analysis* of that information: what the information means and what action it suggests. Common types of short analytical reports include feasibility reports, recommendation reports, and justification reports.

### **Feasibility Reports**

Feasibility reports are used when decision makers need to assess whether an idea or plan or course of action is realistic and practical: “How *doable* is this idea?” Although a particular course of action might be *possible*, it might not be *practical*—because such action might be too costly or hazardous or poorly timed, among other reasons. For example, a maker of precision tools might examine the feasibility of automating several key manufacturing processes. While automating these tasks might lower costs and increase productivity for the short term, the dampening effect of layoffs on company morale could lead to reduced productivity as well as quality control problems for the long term.

A feasibility analysis provides answers to questions like these:

- *Is this course of action likely to succeed?*
- *Why or why not?*
- *What are the assessment criteria (e.g., cost, safety, productivity)?*
- *Do the benefits outweigh the drawbacks or risks?*
- *What are the pros and cons?*
- *What alternatives do we have?*
- *Can we get the funding?*
- *Should we do anything at all? Should we wait?*

#### **NOTE**

*An assessment of feasibility often requires two additional types of analysis: an examination of what caused a problem or situation and a comparison of two or more alternative solutions or courses of action. For detailed discussion of these three analytical approaches, see pages 607–09.*

In the following memo, a securities analyst for a state pension fund reports to the fund’s manager on the feasibility of investing in a rapidly growing computer maker. (Notice the

technical language, appropriate for an audience familiar with the specialized terminology of finance.)

## **A FEASIBILITY ANALYSIS**

### **State Pension Fund**

#### **MEMORANDUM**

To: Mary K. White, Fund Manager  
From: Martha Mooney  
Date: April 1, 20xx  
Subject: *The Feasibility of Investing in WBM Computers, Inc.*

Our zero-coupon bonds, comprising 3.5 percent of State Pension Fund's investment portfolio, will mature on April 15. Current inflationary pressures are making fixed-income investments less attractive than equities. As you requested, I have researched and compared the feasibility of various investment alternatives based on these criteria: market share, earnings, and dividends.

#### **Recommendation**

Given its established market share, solid earnings, and generous dividends, WBM Computers, Inc. is a sound and promising company. I recommend that we invest our maturing bond proceeds in WBM's Class A stock.

#### **Market Share**

Although only ten years old, WBM successfully competes with well established computer makers. WBM's market share has grown steadily for the past five years. For this past year, total services and sales ranked 367th in the industrial United States, with orders increasing from \$750 million to \$1.25 billion. Net income places WBM 237th in the country, and 13th on return to investors.

#### **Earnings**

WBM's margin for profit on sales is 9 percent, a roughly steady figure for the past three years. Whereas 1995 earnings were only \$ .09 per share, this year's earnings are \$1.36 per share. Included in these ten-year earnings is a two-for-one stock split issued on November 2, 2004. Barring a global downturn in computer sales, WBM's outlook for continued strong earnings is promising.

#### **Dividends**

Investors are offered two types of common stock, listed on the American Stock Exchange. The assigned par value of both classes is \$.50 per share. Class A stock pays an additional \$.25 per share dividend but restricts voting privileges to one vote for every ten shares held by the investor. Class B stock is not entitled to the extra dividend but carries full voting rights. The additional dividend from Class A shares would enhance income flow into our portfolio.

WBM shares now trade at 14 times earnings, with a current share price of \$56.00, a relative bargain in my estimation. An immediate investment would add strength and diversity to our portfolio.

Feasibility analysis is an essential basis for any well-conceived recommendation. Notice how the following

recommendation and justification reports include implicit considerations of feasibility. Before people will accept your recommendation, you have to persuade them that this is a good idea.

### **Recommendation Reports**

Recommendation reports interpret data, draw conclusions, and recommend a course of action, usually in response to a specific problem. The following recommendation report is addressed to the writer's supervisor. This is just one example of a short report used to examine a problem and recommend a solution.

### **A Problem-Solving Recommendation**

Bruce Doakes is assistant manager of occupational health and safety for a major airline that employs over two hundred reservation and booking agents. Each agent spends eight hours daily seated at a workstation that has a computer, telephone, and other electronic equipment. Many agents have complained of chronic discomfort from their work: headache, eyestrain and irritation, blurred or double vision, backache, and stiff neck and joints.

Bruce's boss asked him to study the problem and recommend improvements in the work environment. Bruce surveyed employees and consulted ophthalmologists, chiropractors, orthopedic physicians, and the latest publications on ergonomics (tailoring work environments for employees' physical and psychological well-being). After completing his study, Bruce composed his report. ...

Bruce's report had to be persuasive as well as informative.

## **RECOMMENDATION MEMO**

### **Trans Globe Airlines**

#### **MEMORANDUM**

To: R. Ames, Vice President, Personnel

From: B. Doakes, Health and Safety

Date: August 15, 20xx

Subject: **Recommendations for Reducing Agents' Discomfort**

In our July 20 staff meeting, we discussed physical discomfort among reservation and booking agents, who spend eight hours daily at automated workstations. Our agents complain of headaches, eyestrain and irritation, blurred or double vision, backaches, and stiff joints. This report outlines the apparent causes and recommends ways of reducing discomfort.

#### **Causes of Agents' Discomfort**

For the time being, I have ruled out the computer display screens as a cause of headaches and eye problems for the following reasons:

1. Our new display screens have excellent contrast and no flicker.
2. Research findings about the effects of low-level radiation from computer screens are inconclusive.



The headaches and eye problems seem to be caused by the excessive glare on display screens from background lighting.

Other discomforts, such as backaches and stiffness, apparently result from the agents' sitting in one position for up to two hours between breaks.

### **Recommended Changes**

We can eliminate much discomfort by improving background lighting, workstation conditions, and work routines and habits.

**Background Lighting.** To reduce the glare on display screens, these are recommended changes in background lighting:

1. Decrease all overhead lighting by installing lower-wattage bulbs.
2. Keep all curtains and adjustable blinds on the south and west windows at least half-drawn, to block direct sunlight.
3. Install shades to direct the overhead light straight downward, so that it is not reflected by the screens.

**Workstation Conditions.** These are recommended changes in the workstations:

1. Reposition all screens so light sources are neither at front nor back.
2. Wash the surface of each screen weekly.
3. Adjust each screen so the top is slightly below the operator's eye level.
4. Adjust all keyboards so they are 27 inches from the floor.
5. Replace all fixed chairs with adjustable, armless, secretarial chairs.

**Work Routines and Habits.** These are recommended changes in agents' work routines and habits:

1. Allow frequent rest periods (10 minutes each hour instead of 30 minutes twice daily).
2. Provide yearly eye exams for all terminal operators, as part of our routine healthcare program.
3. Train employees to adjust screen contrast and brightness whenever the background lighting changes.
4. Offer workshops on improving posture.

These changes will give us time to consider more complex options such as installing hoods and antiglare filters on terminal screens, replacing fluorescent lighting with incandescent, covering surfaces with nonglare paint, or other disruptive procedures.

cc. J. Bush, Medical Director  
M. White, Manager of Physical Plant

For more examples and advice on formulating, evaluating, and refining your recommendations, see pages 612–15.

### **Justification Reports**

Many recommendation reports respond to reader requests for a solution to a problem; others originate with the writer, who

has recognized a problem and developed a solution. This latter type is often called a *justification report*. As the name implies, such reports *justify* the writer's position on some issue.

Justification reports therefore typically follow a direct organizing plan, beginning with the request or recommendation. Such reports answer this key question for recipients: *Why should we?*

Typically, justification reports follow a version of this arrangement:

1. State the problem and your recommendations for solving it.
2. Point out the cost, savings, and benefits of your plan.
3. If needed, explain how your suggestion can be implemented.
4. Conclude by encouraging the reader to act.

The next writer uses a version of the preceding arrangement: she begins with the problem and recommended solution, spells out costs and benefits, and concludes by reemphasizing the major benefit. The tone is confident yet diplomatic—appropriate for an unsolicited recommendation to a superior.

## JUSTIFICATION MEMO

### **Greentree Bionomics, Inc.**

#### MEMORANDUM

To: D. Spring, Personnel Director  
Greentree Bionomics, Inc. (GBI)  
From: M. Noll, Biology Division  
Date: April 18, 20xx  
Subject: **The Need to Hire Additional Personnel**

#### **Introduction and Recommendation**

With twenty-six active employees, GBI has been unable to keep up with scheduled contracts. As a result, we have a contract backlog of roughly \$500,000. This backlog is caused by understaffing in the biology and chemistry divisions.

To increase production and ease the workload, I recommend that GBI hire three general laboratory assistants.

The lab assistants would be responsible for cleaning glassware and general equipment; feeding and monitoring fish stocks; preparing yeast, algae, and shrimp cultures; preparing stock solutions; and assisting scientists in various tests and procedures.

#### **Costs and Benefits**

While costing \$74,880 yearly (at \$12.00/hour), three full-time lab assistants would have a positive effect on overall productivity:

1. Uncleaned glassware would no longer pile up, and the fish holding tanks could be cleaned daily (as they should be) instead of weekly.
2. Because other employees would no longer need to work more than forty hours weekly, morale would improve.
3. Research scientists would be freed from general maintenance work (cleaning glassware, feeding and monitoring the fish stock, etc.). With more time to perform client tests, the researchers could eliminate our backlog.
4. With our backlog eliminated, clients would no longer have cause for impatience.

### **Conclusion**

Increased production at GBI is essential to maintaining good client relations. These additional personnel would allow us to continue a reputation of prompt and efficient service, thus ensuring our steady growth and development.

## **ELECTRONIC MAIL**

Surveys show that email, in the words of one researcher, “is by far the most frequently used and highly prized feature of the Internet,” with messages sent each day numbering in billions (Specter, 95, 101). See Figure 17.2 for elements of a typical email message.

### **Email Benefits**

Compared to phone, fax, or conventional mail (or even face-to-face conversation, in some cases), email can offer real advantages:

- *Lack of real-time constraints.* Email allows people to communicate at any time. Besides eliminating “telephone tag,” email offers the choice of when to read a message and whether to respond.
- *Efficient filing, retrieval, and forwarding.* Email messages can be filed for future reference, cut and pasted into other documents, and forwarded to others in a single keystroke.
- *Attachments.* Documents or electronic files can be attached and sent for the recipient to download, usually with the original formatting intact.
- *Democratic communication.* Email allows anyone in an organization to contact anyone else. The filing clerk could conceivably email the company president directly, whereas a conventional memo or phone call would be routed through the management chain or screened by assistants (D. Goodman 33–35). In addition, shy people

may be more willing to speak out during an email conversation.

**NOTE** *Communication expert Stuart Selber offers this important caution: “The mere presence of email on the job does not mean that someone’s work environment supports democratic uses of email. In fact, just the opposite could be true: a company can use email to monitor and [intimidate employees].”*

- *Creative thinking.* Email users generally communicate spontaneously—without worry about page design, paragraph structure, or perfect phrasing. This relatively free exchange of views can lead to new insights or ideas (Bruhn 43).
- *Collaboration and research.* Teams can keep in touch via email, and researchers can contact people for answers they need.

**NOTE** *While electronically mediated collaboration increases the quality and sharing of ideas, groups who meet only via network develop less trust than groups who have some face-to-face contact (Ross-Flanigan 57, 58).*

### **Email Copyright Issues**

Any email message you receive is copyrighted by the person who wrote it. Under current law, forwarding this message to anyone for any purpose is a violation of the owner’s copyright. The same is true for reproducing an email message as part of any type of publication—unless your use of this material falls within the boundaries of “fair use.” (See pages 138, 144.)

### **Email Privacy Issues**

Gossip, personal messages, risqué jokes, or complaints about the boss or a colleague—all might reach unintended recipients. While phone companies and other private carriers are governed by laws protecting privacy, no such legal protection yet exists for Internet communication (Peyser and Rhodes 82). The Electronic Privacy Act of 1986 offers limited protection against unauthorized reading of another person’s email, but employers are exempt (Extejt 63).

In some instances it may be proper for an employer to monitor E-mail, if it has evidence of safety violations, illegal activity, racial discrimination, or sexual improprieties, for instance. Companies may also need access to business

information, whether it is kept in an employee's drawer, file cabinet, or computer E-mail (Bjerklie 15).

Email privacy can be compromised in other ways as well:

- Everyone on a group mailing list—intended recipient or not—automatically receives a copy.
- Even when “deleted” from the system, messages can live on, saved in a backup file.
- Besides infringing on copyright (see page 138), forwarding a message without the author's consent violates that person's privacy.
- Anyone with access to your network and password can read your document, alter it, use parts of it out of context, pretend to be its author, forward it, plagiarize your ideas, or even author a document or conduct illegal activity in your name. (One partial safeguard is encryption software, which scrambles the message, and the only people who can unscramble it are those who have the code. Another security strategy is to circulate any sensitive documents as an email attachment in Adobe *Portable Document File* format. PDF format prevents a document from being altered or rewritten.)

## **INSTANT MESSAGING**

A faster medium than email, instant messaging (IM) allows for text-based conversation in real time: The user types a message in a pop-up box and the recipient can respond instantly. IM groupware enables multiple users to converse and collaborate from various locations. According to *Fortune* magazine, “instant messaging is rising fast in corporate America,” rapidly displacing email for routine communication (Varchaver 102).

Although instant messaging has been popular among teens and college students, its more recent advent as a business tool means that few rules govern its use. Also, most current IM software does not automatically save these messages electronically. But as IM becomes more pervasive in the workplace, companies will likely monitor its use by employees and save all messages as a permanent record.

## **EXERCISES**

1. We would all like to see changes in our schools' policies or procedures, whether they are changes in our majors, school regulations, social activities, grading policies, or registration procedures. Find some area of your school that needs obvious changes, and write a justification report to the person who might initiate that change.

Explain why the change is necessary and describe the benefits. Follow the format on page 399.

2. Think of an idea you would like to see implemented in your job (e.g., a way to increase productivity, improve service, increase business, or improve working conditions). Write a justification memo, persuading your audience that your idea is worthwhile.
3. Write a memo to your employer, justifying reimbursement for this course. *Note:* You might have written another version of this assignment for Exercise 2 in Chapter 1. If so, compare early and recent versions for content, organization, style, and format.
4. Identify a dangerous or inconvenient area or situation on campus or in your community (endless cafeteria lines, a poorly lit intersection, slippery stairs, a poorly adjusted traffic light). Observe the problem for several hours during a peak use period. Write a justification report to a *specifically identified* decision maker, describing the problem, listing your observations, making recommendations, and encouraging reader support or action.
5. Assume that you have received a \$10,000 scholarship, \$2,500 yearly. The only stipulation for receiving installments is that you send the scholarship committee a yearly progress report on your education, including courses, grades, school activities, and cumulative average. Write the report.
6. In a memo to your instructor, outline your progress on your term project. Describe your accomplishments, plans for further work, and any problems or setbacks. Conclude your memo with a specific completion date.
7. Keep accurate minutes for one class session (preferably one with debate or discussion). Submit the minutes in memo form to your instructor.
8. Conduct a brief survey (e.g., of comparative interest rates from various banks on a car loan, comparative tax and property evaluation rates in three local towns, or comparative prices among local retailers for an item). Arrange your data and report your findings to your instructor in a memo that closes with specific recommendations for the most economical choice.
9. Recommendation report (choose one)
  - a. You are legal consultant to the leadership of a large autoworkers' union. Before negotiating its next contract, the union needs to anticipate effects of robotics technology on assembly-line autoworkers within ten years. Do the research and write a report recommending a course of action.
  - b. You are a consulting engineer to an island community of two hundred families suffering a severe shortage of fresh water. Some islanders have raised the possibility of producing drinking water from salt water (desalination). Write a report for the town council, summarizing the process and describing instances in which desalination has been used successfully or unsuccessfully. Would desalination be economically feasible for a community this size? Recommend a course of action.
  - c. You are a health officer in a town less than one mile from a massive radar installation. Citizens are disturbed about the effects of microwave radiation. Do they need to worry? Should any precautions be taken? Find the facts and write your report.
  - d. You are an investment broker for a major firm. A longtime client calls to ask your opinion. She is thinking of investing in a company that is fast becoming a leader in nanotechnology. "Should I invest in this technology?" your client wants to know. Find out, and give her your recommendations in a short report.
  - e. The buildings in the condominium complex you manage have been invaded by carpenter ants. Can the ants be eliminated by any insecticide *proven* nontoxic to humans or pets? (Many dwellers have small children and pets.) Find out, and write a report making recommendations to the maintenance supervisor.

- f. The “coffee generation” wants to know about the properties of caffeine and the chemicals used on coffee beans. What are the effects of these substances on the body? Write your report, making specific recommendations about precautions that coffee drinkers can take.
  - g. As a consulting dietitian to the school cafeteria in Blandville, you’ve been asked by the school to report on the most dangerous chemical additives in foods. Parents want to be sure that foods containing these additives are eliminated from school menus, insofar as possible. Write your report, making general recommendations about modifying school menus.
  - h. Dream up a scenario of your own in which information and recommendations would make a real difference. (Perhaps the question could be one you’ve always wanted answered.)
10. Individually or in small groups, decide whether each of the following documents would be appropriate for transmission via a company email network. Be prepared to explain your decisions.
- Sarah Burnes’ memo about benzene levels (page 19)

THE “RATIONAL CONNECTION” MEMO (PAGE 50)

- The “better” memo to the maintenance director (page 53)
- Tom Ewing’s letter to a potential customer (page 63)
- The medical report written for expert readers (page 30)
- A memo reporting illegal or unethical activity in your company
- A personal note to a colleague
- A request for a raise or promotion
- Minutes of a meeting
- Announcement of a no-smoking policy
- An evaluation or performance review of an employee
- A reprimand to an employee
- A notice of a meeting
- Criticism of an employee or employer
- A request for volunteers
- A suggestion for change or improvement in company policy or practice
- A gripe
- A note of praise or thanks
- A message you have received and have decided to forward to other recipients

**COLLABORATIVE PROJECTS**

1. Organize into groups of four or five and choose a topic for which group members can agree on a position. Here are some possibilities:
- Should your college abolish core requirements?
  - Should every student in your school pass a writing proficiency exam before graduating?
  - Should courses outside your major be graded pass/fail at your request?
  - Should your school drop or institute student evaluation of teachers?
  - Should all students be required to be computer literate before graduating?
  - Should campus police carry guns?
  - Should school security be improved?
  - Should students with meal tickets be charged according to the type and amount of food they eat, instead of paying a flat fee?

As a group, decide your position on the issue, and brainstorm collectively to justify your recommendation to a stipulated primary audience in addition to your classmates and instructor. Complete an audience and use profile (page 65), and compose a justification report. Appoint one member to present the report in class.

2. Divide into groups and respond to the following scenario:

As a legal safeguard against discriminatory, harassing, or otherwise inappropriate email messages, a legal consultant to your company or college has proposed a plan for electronic monitoring of email use at your organization. Your employer or college dean has asked your team to study the issue and to answer this question: "Should we support this plan?" Among the many subordinate questions to consider:

- What are the rights of the people who would be monitored?
- What are the rights of the organization?
- Is the plan ethical?
- Could the plan backfire? Why?
- How would the plan affect people's perception of the organization?
- Should monitoring be done selectively or routinely?
- Should the entire organization be given a voice in the decision?
- Are there acceptable alternatives to monitoring?

Begin by reviewing Chapters 5 and 6 and consulting Figure 24.3. Then do the research and prepare a memo that makes a persuasive case for your team's recommendation.

Web sites that address privacy issues:

- *Electronic Privacy Information Center*, a public interest research center at <[www.epic.org](http://www.epic.org)>.
- *Privacy International*, a human rights group at <[www.privacy.org/pi/](http://www.privacy.org/pi/)>.
- *Computer Professionals for Social Responsibility*, a public interest group at <[www.cpsr.org](http://www.cpsr.org)>.

3. People regularly contact your organization (your company, agency, or college department) via email, letter, or your Web site to request information. You decide to prepare a FAQ list in response to the ten most frequently asked questions about products, services, specific concentrations within the major, admission requirements, or the like. In addition to being posted on your Web site, this list can be sent as an email attachment or mailed out as hard copy, depending on the reader's preference.

After analyzing your specific audience and purpose and doing the research, prepare your list in a short report format.

**TECHNICAL COMMUNICATION IN THE NEWS**

**TECHNICAL COMMUNICATION IN THE NEWS**

The role of analysis in a technical report

Memos have many uses

Memos have legal and ethical implications

What memo recipients want to know

A hostile approach

A more reasonable approach

When memos go wrong

**FIGURE 17.1 Elements of a Usable Memo**

"Should the details or the bottom line come first?"

Progress reports serve many purposes

What recipients of a progress report want to know

Summarizes achievements to date

Details the achievements

Describes what remains to be done

Gives a rough timetable

Summarizes achievements to date

Describes work remaining, with timetable



Describes problems encountered  
Gives overview of recent activities, and their purpose  
Gives details  
Explains the benefits of these activities  
What recipients of minutes want to know  
Tells who attended  
Summarizes discussion of each item  
Tells who said what  
Tells what was voted

### Testing for usability

*We create surveys, and even when we devise questions that we're convinced are unambiguous, we pretest them—we often find that questions have been misinterpreted. We rewrite them and test them again, until we get them right. The basic element in my writing process is checking and rechecking for ambiguous messages and revising as often as time allows.*

—James North, project manager  
for a market-research firm

# JOB...

# JOB...

*ON THE*

“Should we or shouldn't we?”

What recipients of a feasibility report want to know

Gives brief background

Makes a direct recommendation

Explains the criteria supporting the recommendation

Encourages reader action

17.1

For more sample memos visit

[www.ablongman.com/lannonweb](http://www.ablongman.com/lannonweb)

Provides immediate orientation by giving brief background and main point

Interprets findings and draws conclusions

Makes general recommendations

Expands on each recommendation

Discusses benefits of following the recommendations

How to organize a justification report

Opens with the problem

Recommends a solution

Expands on the recommendation

Shows how benefits would offset costs

Encourages acceptance of recommendation

17.2

How can email disrupt the workplace?

Find out more at

[www.ablongman.com/lannonweb](http://www.ablongman.com/lannonweb)

Email advantages in the workplace

**FIGURE 17.2 Elements of a Typical Email Message** Different email programs produce slightly different formats.

Employers are legally entitled to monitor employee email

Email offers no privacy

**GUIDELINES for Using Electronic Mail\***

**Observe Proper Etiquette**

1. *Check and answer your email daily.* Like an unreturned phone call, unanswered email is annoying. If you're really busy, at least acknowledge receipt and respond later.
2. *Check your distribution list before each mailing.* Verify that your message will reach all intended recipients—but no unintended ones.

**Consider the Ethical, Legal, and Interpersonal Implications**

1. *Assume that your email is permanent and could be read by anyone at any time.* Don't write anything you couldn't say face-to-face. Avoid *spamming* (sending junk mail) and *flaming* (making rude remarks).
2. *Think twice before making humorous remarks.* What seems amusing to you may be offensive to others, including recipients from different cultures. Any email judged to be harassing or discriminatory brings immediate dismissal and often leads to legal action against the company as well as the guilty employee.
3. *Don't use email for confidential information.* Avoid complaining, criticizing, or evaluating people, or anything that should be kept private (say, an employee reprimand).
4. *Don't use the company email network for personal correspondence or for anything not work-related.* Employers increasingly monitor their email networks.
5. *Before you forward an incoming message, obtain permission from the sender.* Assume that anything you receive is the private property of the sender. (See page 138 for email copyright issues.)

**Make the Message Usable**

1. *Limit your message to a single topic.* Remain focused and concise.
2. *Limit your message to a single screen, if possible.* Don't force recipients to scroll needlessly.
3. *Use a clear subject line to identify your topic.* Instead of "Test Data" or "Data Request," announce your purpose clearly: ("Request for Beta Test Data for Project #16"). Recipients scan subject lines in deciding which new mail to read immediately.
4. *Refer clearly to the message to which you are responding:* ("Here are the Project 16 Beta test data you requested on Oct. 10").
5. *Keep sentences and paragraphs short.*
6. *Use a block format.* Don't indent paragraphs.
7. *Don't write in FULL CAPS—unless you want to SCREAM at the recipient!*
8. *Where appropriate in formal emails, use graphic highlighting.* Headings, bullets, numbered lists, boldface, and italics improve readability and impart professionalism.
9. *Where appropriate, use formal salutations and closings.* Choose the level of formality that reflects your recipient and your purpose. When addressing someone you don't know or someone in a position of authority, begin with a formal salutation ("Dear Doctor Gomez") and end with formal closing

(“Sincerely”). But for a familiar recipient, be less formal (“Hello,” “Regards”).

10. *Use smiley faces and abbreviations sparingly.* Smiley faces, made from a colon, dash, and right-hand parentheses:-) are used to signify humor. Use these and other emoticons infrequently and only in informal messages to people you know well. Also, common email abbreviations (FYI, TW, HAND—which mean “for your information,” “by the way,” and “have a nice day”) may annoy some recipients.
11. *Close with a signature section.* Include the name of your company or department, your telephone and fax number, and any other contact information the recipient might consider relevant.
12. *Don’t send huge or specially formatted attachments (or enclosures) without checking with the recipient.* Not all email browsers can handle formatted files, photos, and so on. Also, if a recipient has a slow Internet connection, downloading a long or complex attachment will take forever. Always ask beforehand about whether the recipient’s browser can accept attachments and about which file types (*Simple Text, PDF File, Rich Text Format*, and so on) the equipment can handle.
13. *Proofread for spelling, punctuation, and grammar.* A mechanically correct message is always more credible than a sloppy one.

\*Adapted from Bruhn 43; D. Goodman 33–35, 167; “Email Etiquette” 3; Gurak and Lannon 186; Kawasaki, “The Rules” 286; D. Munger; Nantz and Drexel 45–51; Peyser and Rhodes 82.

(continues)

Guidelines (continued)

#### **GUIDELINES for Choosing Email Versus Paper or Telephone**

Email is excellent for reaching a lot of people quickly with a relatively brief, informal message. Instant messaging is good for conversation. But there are often good reasons to put something on paper—or to speak directly with the recipient instead.

1. *Don’t use email when a more personal medium is preferable.* Sometimes an issue is best resolved by a phone call, or even by voice mail—whereas email might imply that the sender can’t be bothered to speak with the recipient directly.
2. *Don’t use email for a detailed discussion.* In contrast to a rapid-fire email message, preparing a paper document is generally more deliberate, giving you a chance to shape and clarify your thinking, to choose words carefully, and to revise. Also, a well-crafted paper document (say, a memo or a letter) is likely to be read more attentively. (For in-house recipients, consider transmitting your paper document as a file attached to a brief, introductory email.)
3. *Don’t use email for most formal correspondence.* Because of the volume and causal style of email, recipients might overlook the significance of a message. Don’t use email to apply for a job, request a raise, resign from a job, or respond to clients or customers unless recipients specifically request

this method. (Chapter 18 discusses letters—including electronic job hunting.)

### ❖ **CHECKLIST for Usability of Memo Reports**

*(Numbers in parentheses refer to the first page of discussion.)*

#### **Ethical, Legal, and Interpersonal Considerations**

- ❖ Is the information specific, accurate, and unambiguous? (386)
- ❖ Is this the best report medium (paper, email, phone) for the situation? (405)
- ❖ Is the memo inoffensive to all parties? (386)
- ❖ Are all appropriate parties receiving a copy? (388)

#### **Organization**

- ❖ Is the direct or indirect pattern used appropriately to present the report's bottom line? (388)
- ❖ Is the material “chunked” into easily digestible parts? (387)

#### **Format**

- ❖ Does the memo have a complete heading? (387)
- ❖ Does the subject line forecast the memo's contents? (387)
- ❖ Are paragraphs single spaced within and double spaced between? (387)
- ❖ Do headings announce subtopics? (387)
- ❖ If more than one reader is receiving copies, does the memo include a distribution notation (cc:) to identify other readers? (416)
- ❖ Does the document's appearance create a favorable impression? (387)

#### **Content**

- ❖ Is the message short and to the point? (385)
- ❖ Are tables, charts, and other graphics used as needed? (387)
- ❖ Are recipients given enough information for an *informed* decision? (39)
- ❖ Are the conclusions and recommendations clear? (399)

#### **Style**

- ❖ Is the writing clear, concise, exact, fluent, and appropriate? (244)
- ❖ Is the tone appropriate? (274)
- ❖ Has the memo been carefully proofread? (24)

For more exercises, visit

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