Anesthesiologists Associated Incorporated

Business Writing Skills

DOCUMENT VERSION

ACKNOWLEDGEMENTS

CONFIDENTIALITY AND PROPRIETARY RIGHTS

LIMITATIONS AND CONDITIONS OF USE

Table of Contents

Business Writing Skills

Organizational Learning Goals:
- Enhance the ability of AAI employees to deliver quality service to our clients, by establishing a consistent level of quality of writing that all customers can expect, and
- Facilitate effective working relationships.

Description of Course:

This course is targeted to address writing needs specific to the Healthcare Business Services industry and customized for AAI's unique business context. The course design facilitates learning and provides practice in writing and editing business documents commonly used by AAI staff. In addition, to participation in three, teacher-led learning sessions, participants learn through use of additional on-line resource materials, and one-on-one correspondence with the teacher, who provides individual support on current work-related correspondence and written projects.

Learning Objectives:
By the end of this course, participants will be able to:
- Write effective business documents (correspondence, e.g. email, memo, letters and proposals) commonly used by AAI staff.
- Apply appropriate business/technical writing styles and formats to documents created for use at AAI.
- Apply proven strategies for organizing and then writing clear, concise documents to convey the intended message to clients and co-workers.
- Proofread, revise, and edit documents for proper grammar, punctuation, and spelling to produce error-free documents.
- Identify and use appropriate document types, e.g. email, formal letter, etc. to handle various AAI business situations.

This page is intentionally blank.

Document Development Strategy

Before beginning to write, use a rhetorical strategy to plan your document. This pre-writing analysis will enable you to develop a more effective document. It will also help you avoid problems in content, mechanics and delivery.

One way to approach document development is **PAT**. The key in this approach is to analyze your **Purpose** and your **Audience** BEFORE you choose your **Technique**.

Purpose:

Topic

Clarify your subject as the first step in document analysis. Are you responding to a question or request? Are you describing a process or product? Are you presenting a solution to a problem? Are you documenting past or present activities? Identify your primary topic and any supporting subjects. (Remember that too many topics will lessen the effectiveness of your document. It may be better to use multiple documents with separate delivery instead.)

Goals

Identify your goals for the document. The document may be meant to inform, persuade, respond, record, cite, entertain, or some combination of these. Distinguish which goal or goals are most important, and what behavior you want to elicit from the reader.

Requirements/Restrictions

Plan a *schedule* for document development, allowing for drafts and proofreading, and note the *deadline* for delivery. Even short or informal documents need a schedule. Ascertain any requirements for *budget or materials*. Note the method of *delivery* you plan to use.

Audience:

Identity

Distinguish who your readers will be. You may have multiple audiences, each with its own set of needs.

Expectations/Needs

Identify the format and style that the readers expect. Consider the context in which your readers will read your document. How and where will the document be used? Evaluate the

breadth and depth of information needed by the reader. Assess any special needs relating to language or graphics.

Requirements/Restrictions

Note any requirements the audience may have for *schedule* (especially deadline), *materials*, and *delivery*. Identify any *tools* used to receive or read the document. This is especially important for electronic documents and multimedia.

Technique

Format

Identify the appropriate format given your purpose and audience. Choose the method of communication that best fits content and delivery. Consider *multiple modes* (using more than one document type) to communicate your message.

Business vs. Technical Style

Use business style when your purpose is persuasive, designed to motivate the reader to act. Use technical style when your purpose is informative, designed to guide the reader in using a product or process. Some documents may combine both styles.

Document Design

Organize your content and structure for maximum effect. Choose between *frontloading* and *backloading* your document. Use structural methods such as *chunking*, *linking* and parallel form. Ensure proper paragraphing and pagination.

Publishing Requirements

Use graphics and formatted text to emphasize content. Cite material using appropriate methods. Design documents that will work with delivery requirements. Use internal design guidelines and/or external publishing requirements.

Quality Control

Proofread, revise and edit to ensure effective content and sound mechanics (diction, grammar, punctuation and spelling).

Other Document Development Strategies

PAT is only one way to approach document development. Other methods include outlining, storyboarding, mapping, using flow diagrams and developing document specifications. Again, regardless of approach, the key is to plan before beginning to write.

Business Writing Activity #1:

Pick three documents you have written or are writing. Describe the purpose and analyze the audience(s) for these documents.

Document	Purpose	Audience

This page is intentionally blank.

Document Design - Style

Most corporate writing falls into two main types: business and technical. Each style has its own formatting and design requirements. Some documents combine both styles.

Business Style

Business writing is persuasive, designed to motivate the reader to act.   It focuses on the reader and the relationship between client and company.   The writer must be flexible and willing to target the document to the reader as much as possible.   At the same time, it should be economical, delivering the message as quickly and clearly as possible. Examples of business writing include letters, memos, e-mail, proposals and contracts. (Note the focus on relationship in all of these documents.)

Strategies:

- **Gain attention early in the document.** It should quickly be clear to the reader what the purpose of the document is and why they are reading it. Focus on the reader's need for the document and the benefits of continuing to read the document. *Example: "Thank you for your request. This letter provides details on how to complete your application."*

- **Frontload a positive message, and backload a negative message.** Frontloading, sometimes called a direct or deductive pattern, gives your main idea first, followed by details or reasons. Backloading, sometimes called an indirect or inductive pattern, starts with details or reasons, and ends with your main idea. *Frontload example: "We would like to extend our offer of employment for the Specialist position. The starting date …." Backload example: "Thank you for your application. We received many qualified applicants for this position. Unfortunately, …."*

- **Use and repeat identifiable key words or phrases.** Emphasize terms that are important to the reader or that identify products/services. This will cause the reader to attend to these identifiers and will help lead them through the document. *Example: "You have requested a waiver due to hardship. In order to process a hardship write-off, we need the following documentation: … We can then approve your hardship waiver."*

- **Explain technical or unfamiliar terms as needed.** Technical terms, jargon and acronyms may confuse the reader. Give explanations within the document and near the term used. (Do not rely on a glossary or similar tool.) *Example: "To help us process your request, please identify your Rendering Provider. This is the clinic or hospital in which you received care, along with the physician attending."*

- **Always include a "request for action."**   You may request action directly related to your topic (*e.g., "Please submit the XYZ form by June 21st for processing."*) or indirectly related (*e.g., "If you have any questions, please let me know."*). In either case, the "request for action" allows for a continuation of the business relationship.

- **Consider multiple modes of delivery.** Communicating the same message in more than one way gives the reader options for access and increases the likelihood the message will be received. For example, you may want to e-mail a document and FAX it to ensure receipt.

Technical Style

Technical writing is informative, designed to guide the reader in using a product or process. Technical documents are "used" rather than "read". In other words, the reader looks for specific information in the document as they use a product or process. Examples of technical writing include instructions, reports, financial documentation and meeting minutes.

Strategies:

- **Provide for document navigation.**   Because readers are only looking for specific information within technical documents, use elements such as contents, indexes, hyperlinks and other tools. Give an overview of each section (sometimes called a "roadmap") to guide the reader through the text. *Example: "This section describes the required forms to request a transfer of account, followed by instructions for submitting the completed forms."*
- **Create distinct document sections based on function.** Separate the major sections of your document using headings, titles, white space and pagination. Use lists and text boxes to identify important subsections.
- **Frontload most technical documents.** Give your main idea first, followed by details. *Example: "To ensure complete processing, complete the following steps: 1) Submit your XYZ form…."*
- **Use appropriate technical and industry terms, including acronyms.** Write to the technical level of your audience. However, you may need to deal with multiple audiences. To do this, provide separate sections for each type of reader. For example, many technical reports include an *executive summary* that covers main points but includes less technical detail.
- **Integrate technical graphics whenever possible.** Use visual aids, such as charts, tables, graphs, illustrations, etc., to reinforce technical information. Always reference these technical graphics in the text. *Example: "Our market share has been increasing since the fourth quarter of 2006. (See Figure 4.)"*
- **Consider multiple modes of delivery.**

Combining Business and Technical Style

You may want to combine styles, utilizing technical style for a particular section of a business document or introducing a technical document using business style. For example, a cover letter may be used to introduce a customer to instructions for a new process being initiated.

Strategies:

- **Use the correct style for document sections based on function.** Use business style for persuasive functions and technical style for informative functions.
- **Separate sections written in different styles.** Clearly differentiate between sections using headings, titles or text. *Example: "Now that you've read about the advantages of our new software, here are the directions for installation."*

Document Design - Organization

Along with using the basic document formats expected by readers (and covered in later sections of this workbook), there are some key organizational approaches to consider.

Document Flow

Movement through the document, between sections, paragraphs and sentences, is important. Readers who have trouble navigating through a document or who have reading interrupted by abrupt transitions may miss information, fail to understand your main points, or even stop reading. There are a variety of strategies to improve document flow.

Strategies:

- **Frontload/backload based on audience expectations or acceptance.** Generally, frontload a positive message and backload a negative message.
- **Use roadmaps, signposts and cues.** *Roadmaps* are summaries or overviews given in the text that describe the content that follows. *Signposts* are graphical elements that signal an important element or change in the text. *Cues* are words or phrases that guide the reader through transitions. *Key words* can be repeated as *cues*. *Example: "In conclusion…."*
- **"Chunk" sections of your text.** Use paragraphs, subheadings, vertical lists, and other subdivisions to break text into recognizable and easily managed sections or *chunks*. This aids reading and navigation for the reader.
- **"Link" sections of your text.** While you should *chunk,* also provide transitions between sections using linking phrases and words. *Example: "As you can see, there are many advantages to this approach. However, there are some disadvantages to consider."*
- **Present similar information in parallel form.** Construct related text and graphics alike throughout the document to help readers anticipate meaning and to assist with navigation. For example, if you use a horizontal list to present one set of details, a similar set should also be presented as a horizontal list.

Document Focus

A major error that many writers make is trying to do too much with a single document. Generally, keep any document focused on one main topic. If you have multiple topics to cover, consider linking separate documents and using a cover or overview document to introduce the separate pieces.   Writers may also have trouble maintaining focus within a document. It may be useful to remember the *Rule of Ones.*

The Rule of Ones

- One topic per document
- One topic sentence per paragraph
- One idea per sentence

Mini-Documents

Mini-documents are supplements that summarize or overview your full document. These are especially useful for long documents, where readers may want a preview before reading the full document or a summary afterwards. Mini-documents also may be used to address multiple audiences. Executive summaries, abstracts, chapter summaries and detailed contents are all examples of mini-documents.

Publishing Requirements

Most organizations have formal or informal publishing guidelines. Where these guidelines are provided in a *style guide*, requirements are easy to follow. Where there are no published guidelines, writers must rely on reader expectations and purposeful writing to decide on style and organizational approaches.

Graphics

Graphics should be used sparingly in both business and technical writing, and only to communicate information or mood. Care should be taken to present a professional image, as well as meeting any copyright, trademark or other legal restrictions. There are some common standards for using informative graphics within a document.

- **Only use visuals when useful/necessary.**

- **Refer to visuals in the text (see Figure 1).**

- **Place visuals near and after references.**

- **Label figures and tables with a number and caption.**

- **Label the important parts of visuals.**

- **Make all labels horizontal when possible.**

- **Keep size, level of detail, color of visuals readable.**

- **Cite your sources when necessary.**

- **Use white space to improve impact and readability.**

Figure 1 Advice

Source: Webmuseum, http://metalab.unc.edu/wm/paint/auth/caroll/
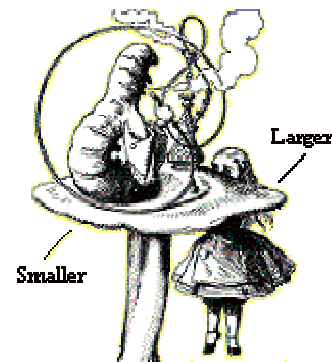
Formatted Text

AAI utilizes several pre-formatted templates for various business documents. Where no published guidelines exist for formatting text, there are some generally accepted norms:

- **Use 10-12 point type for main text.** Use larger type for titles and headings.
- **Pick a commonly used font.** Fonts such as *Times New Roman*, *Century*, *Helvetica* and *Ariel* are familiar and will not distract readers. Always use a common font when sending a document electronically.

> **NOTE**: AAI uses *Tahoma* font for most written communications, with the exception of external marketing materials for which AAI uses the *Frutiger* font.

- **Choose either serif or san serif font.** Be consistent with this choice throughout the document. Generally, serif is easier to read and is considered more formal.
- **Bold or italicize for emphasis.** Because of the prevalence of hypertext links, only use *underlining* when necessary.
- **Justify left margins only.** Leave right margins *ragged* or unjustified.
- **Limit your use of lists.** Especially avoid repetitive use of horizontal lists.
- **Use appropriate formatting for lists.** Number lists when order matters such as sequence, steps or quantity. Bullet lists when order does not matter. Punctuation will vary for horizontal and vertical lists.
- **Keep pagination consistent.** Choose a pagination scheme to help the reader navigate through longer documents. Shorter documents may not need pagination.
- **Emphasize sections with text boxes.** This is especially useful for *cautions*, *examples*, *notes* or *sidebars*.
- **Do not use too many text styles.** Too many visual changes to the text (color, font size, emphasis, lists, etc.) will distract the reader.
- **Use color when appropriate.** Unless publishing costs are prohibitive, color adds emphasis and variety. Color is especially useful in graphics and in electronic documents. Remember that color can also be added through choice of paper or stationary.

Citing Sources

Citation is usually required when using *quotes*, *paraphrases* and *summaries*, *ideas not commonly known or referenced*, or *borrowed material that appears original*. Generally, you do not need to cite material copyrighted or created by your employer if that material is used for business purposes. However, if the document may be published or reproduced, you may want to cite anyway. Use the correct citation style based on industry standard, in-house guidelines, or editor/reader preference.

Delivery Needs

Your design choices may be limited by the delivery needs of your audience. Printing restrictions, electronic delivery, size and location of audience, and other factors may direct how you develop your document. Whenever possible, clarify and meet the needs of your readers.

This page is intentionally blank.

Business Writing Activity #2

Using the three documents you analyzed in Activity #1, describe the techniques you will use to meet your purpose and audience needs. Note any stylistic choices and major document design requirements and strategies.

Document	Technique

This page is intentionally blank.

Common Business Document Formats

Memos

Purpose: Memos are used for internal communication of information (policies and procedures), requests for or replies to internal action, or confirmation/denial of decisions or actions. They also provide a written record (paper or electronic) of internal proceedings.

NOTE: Click the "Templates" link on the AAI Intranet to locate the AAI Memo Template.

Format:

Use 1 – 1 ½" margins. Adjust vertical placement on page by length of message. Line up all headings with "Subject" header. Justify left margins and use ragged right margins. Single space within paragraphs and double space between paragraphs. Indent all lines for lists and tables.

Company Name/Letterhead
Interoffice Memo

Date: Current date

To: Name and title of primary recipient(s)

From: Name and title of sender *(initialed if paper document)*

Subject: Topic of Memo *(Optional: All caps for emphasis)*

CC: Name of secondary recipient(s)

Salutation *(Optional)* **:**

Introductory Paragraph *(Explain the purpose of the memo. This may require a brief explanation or background to clarify for the reader. Frontload most memos.)*

Body Paragraph(s) *(Detail your request or response. Organize these details in a way that works best for the reader. Only include necessary or persuasive information, unless otherwise required. Only include technical graphics.)*

Concluding Paragraph *(Summarize as necessary. Make reference to any enclosed materials or supplemental documents. Always include a "request for action".)*

(Do not use complimentary close or signature)

*(Type "***enclosure***" if attaching supplemental documents)*

Strategies:

- **Focus on a single topic in each memo.** Reference other documents as needed.
- **Be brief and concise.** Memos should be 1 – 2 pages in length.
- **Use a conversational tone.** Because you are communicating internally, your tone will be less formal than in a letter or other communication with an external reader.
- **Frontload or backload depending on the message.** Use a direct approach for "good news" or a message that will be well received. Use an indirect approach for "bad news" or a message requiring persuasion.
- **Deliver using standard in-house methods unless otherwise requested.**
- **Only use a memo when appropriate.** If an "official" document is required, such as a formal commendation or complaint, use a letter, even for internal communication.

E-mail

Purpose: E-mail was initially used as an electronic memo for internal communications. However, e-mail has become an acceptable communication tool for external communications IF a signature is not required. Because of its conversational "feel", it is sometimes used in place of telephone communications as well. In all cases, it also provides a record of communications stored in electronic form.

Format: E-mail layout is somewhat limited by e-mail software. However, follow the basic organization of memos with some modification for electronic delivery:

Use word-wrap. Single-space within paragraphs and double-space between paragraphs. Write in complete sentences. DON'T USE ALL CAPS! Include a signature block. Use electronic stationary only if appropriate and accepted.

Strategies:

- **Be concise**. Use shorter e-mail messages to introduce longer attached documents.
- **Maintain professionalism and appropriate tone.** E-mail "feels" conversational, but it functions like a document. Consider the purpose and audience to assess proper formality and diction. Use humor with caution.
- **Send attachments only when necessary.** Contact receivers for preferences.
- **Proof before you send.** Keep a copy of your sent messages for your records.
- **Assume all communications are monitored and saved.** Additionally, your message may be forwarded multiple times. (Think of an e-mail message as being "published" rather than sent.)

Letters

Purpose: Letters are formal correspondence used for "official business". They have contractual implications due to the signature. They are used primarily for external communication. Exceptions may include formal internal communications such as letters of recommendations, formal proposals, or formal complaints.

Format: You may use block, modified block or semi-block style. Follow the stylistic guidelines for your organization. Standard content and order are shown below.

Anesthesiologists Associated Incorporated

← Your letterhead/address
City, State, Zip

(1 Blank Line)

Date

(1 Blank Line)

Company/Organization Contact (Name)
Title
Company
Address
City, State , Zip

(4 Blank Lines)

Dear Mr./Ms./Dr. Name or Title:

(1 Blank Line)

Introductory Paragraph *(Explain the purpose of your letter. This may require a brief explanation or background to clarify for the reader. Introduce yourself and indicate where, how or from whom you learned about the position/opportunity/company.)*

Body Paragraph(s) *(Detail your request or response. Organize these details in a way that works best for the reader. Only include necessary or persuasive information, unless otherwise required.)*

Concluding Paragraph *(Make reference to any enclosed materials or supplemental documents. Always include a "request for action".)*

(1 Blank Line)

Sincerely *(Cordially/Respectfully/etc.)*,

(4 Blank Lines for signature)

Your Typed Name

*(Reference **initials** for document preparer and author)*

(1 Blank Line)

*(Skip to lower left hand corner and type **"enclosure"**)*

Corporate Headquarters   8905 SW Nimbus Ave. Suite 300 Beaverton, Oregon 97008   aai-office.com   800.275.8752

Strategies:

- **Use letters for external correspondence and use memos for internal correspondence.** Exceptions may include formal internal communications (letters of recommendations, formal proposals, formal complaints) or informal external communications (when pre-existing business or personal relationship exists, such as between vendor and customer).
- **Use formal letter style.** Write to business standards and in professional tone. If the communication seems "too formal," consider sending a memo or e-mail.
- **Always include a "request for action".** This may be a request for specific action *("Please send your request within three business days.")* or it may be implied *("If you need additional information, please let me know.").*
- **Keep the letter as short as possible**.
- **Clarify corresponding parties**. Whenever you are able, address the letter to a specific individual to ensure prompt action. If this is not possible, address the letter to a specific group (e.g., department, committee, etc.) or to a title (e.g., "Operations Manager", "Customer Service Representative", etc.).
- **Consider the direct or implied contractual obligations of your letter**. Only include appropriate information in the letter.
- **Proofread before sending**. Also, check for correct mailing addresses, adequate postage and other factors that may affect delivery.

Reports

Purpose: Reports and studies document either primary research (data and analysis from observations, experiments, surveys, interviews, etc.) or secondary research (data and analysis from published sources and unpublished notes, lectures, etc.) This documentation is used to aid decisions, qualify sources and record (often for legal or financial purposes) work or activities.

Format: Reports may be formal, following a prescribed format and style, or may be informal. Informal reports are usually shorter and often take the form of letters, memos or other internal communications. Most reports include a summary of findings. Many reports also include conclusions or recommendations.

Most reports have similar organization, altered primarily by acceptable length and amount of detail required by the audience. Because reports and studies are often submitted for publication, you must closely follow style and submission guidelines. Even internally, a writer often must follow a style guide used by his/her company or organization.

A typical format includes:

Front Matter*

- Cover
- Title Page
- Abstract
- Letter of Transmittal
- Table of Contents
- List of Figures & Tables
- Executive Summary

Introduction

- Definition of Problem (including Scope)
- Background
- Methodology
- Definitions
- Report Organization

Body

- Project Details (Data, Methodology Review, Comparison to Other Studies)
- Conclusion (Analysis of Findings)
- Recommendations
- Notes/References

Back Matter*

- Appendices (Samples, Maps, Formulas, etc.)
- Glossary
- Bibliography ("References", "Works Cited", etc.)
- Resume/Vitae (Optional)
- Index

*Informal reports often do not include Front and Back Matter. In these cases, the introduction also serves as a summary.

Reports that will be published on-line should be designed with hyperlinks and other navigation tools that connect separate sections. It is also acceptable to link to external documents IF doing so will not violate copyright and other restrictions.

Strategies:

- **Present good summaries.** Abstracts, executive summaries, introductions and conclusions provide guidance for readers who do not want to scrutinize your data and methodology. Some readers will only look at the summaries.
- **Provide good navigation.** Because of the length and depth of most reports, Tables of Contents and clear division between sections, including headings, is important.
- **Give a clear description of methodology.** Especially for primary research, demonstrate sound methods of data collections and analysis.
- **Follow publishing/presentation guidelines to ensure use.**

Executive Summary

Purpose: The executive summary provides an overview of the project and summarizes a report (or proposal). It adds persuasive elements and is meant to guide readers, especially non-technical readers, through your main points. As the author, you direct the readers' attention to highlights of your report.

Format: The typical organization of an executive summary follows the main points, in order, of the report. This includes problem definition, background, methodology, findings and recommendations. But the summary condenses each section and eliminates nonessential information. Technical graphics may be included, but only as required to provide essential information.

An alternative organization is the "brochure" style summary, used primarily for non-technical audiences. The main points are still included, but the order and emphasis may be changed to meet the readers' needs. Also, some additional graphics may be included to enhance the "persuasive" element of this summary.

Strategies:

- **Analyze your audience to determine how they will use the executive summary.** For technical audiences, use the more formal "mini-document" approach, following the report structure and focusing on methodology and findings. For non-technical audiences, use a less formal "brochure" approach focusing on readability and communicating recommendations.
- **Keep the executive summary brief.** Some readers will only look at the summary, so include all necessary information. But condense information and highlight main points. Generally, an executive summary should be no more than 10% the length of the full report.
- **Include integral visuals only.** Do not include clip art or non-essential graphics.
- **Write your executive summary AFTER you have completed your report.** Include the key points of the full report. Do not include any information that is not covered in the report.

White Papers

Purpose: Primarily a marketing tool, white papers provide detailed information on products, services, partnerships or models, including "objective" support data and analysis. White papers are both informational, giving technical background, and persuasive, emphasizing benefits. Often white papers seek to demonstrate authority or prominence in a particular field or market.

White papers may be published electronically or traditionally in paper format. These documents are often posted on web sites. They may be mailed/e-mailed to a targeted audience. Often white papers are made available at conferences, conventions and trade shows. White papers may also be published in industry journals and publications.

Format: Although some white papers are presented as formal studies, complete with front and back matter, most are less formal. White papers do include an introduction, body and conclusion, and may include references/sources. The basic elements of white papers include:

- Background of problem/trends/markets
- Brief description of the product, process or model (including visuals)
- Discussion of benefits and advantages of the product, process or model
- Presentation of research (e.g., marketing studies, case studies, surveys, etc.)
- Conclusion/Summary

Strategies:
- **Differentiate your product/service/model from the competition** and reinforce advantages over your competitors.
- **Avoid excessive technical jargon or acronyms.** Use definitions when necessary to ensure reader understanding.
- **Use visuals,** both to show the product/service/model and to clarify research findings.
- **Keep your white paper short, between 1 - 15 pages.**
- **If published electronically, use hyperlinks and other navigation between sections**. Also include links to your company web site.

Agenda

Purpose: The meeting agenda has multiple purposes. Primarily, it is a plan used to organize the meeting and keep the group focused on a specific set of tasks. It also documents topics for those unable to attend and may provide guidance to help attendees prepare for the meeting. Finally, it is used as a general outline during the meeting by the chair and secretary to document meeting activity. It may be helpful in developing meeting minutes, if the meeting stays on agenda.

Format: Specific formats vary by group and by meeting. However, there are basic elements that all agendas should include:

- **Name of group**
- **Date and time of meeting**
- **Location of meeting**
- **Brief description of topics listed chronologically or by priority**
- **Assignments by topic** *(if any)*
- **Proposed allotment of time for each topic**
- **Special instructions for participants** *(preparations expected of participants, restricted attendance or participation, requests for comments or questions, etc.)*
- **AAI Agenda Templates are available on the AAI Intranet**

Strategies:

- **Focus your agenda by limiting the number of agenda items.** This will increase productivity and increase participation.
- **For formal meetings, include a call to order, approval of agenda and minutes and announcements.** Informal meetings will not need these items.
- **Distribute the agenda in advance of the meeting.** Participants will use the time for preparation or to suggest changes to the agenda.
- **Follow the agenda during the meeting.** The meeting leader is responsible for keeping the group on task.
- **If your meeting does not have an agenda, begin the meeting by setting one.** Clarifying the group's goals for the meeting will save time and increase productivity.

Meeting Minutes

Purpose: Minutes provide a final, accurate record of official proceedings including motions and results during meetings. They are often used at the next meeting to clarify past action. Minutes may have legal and/or contractual implications. Minutes may be formal or informal depending on the level of formality for the meeting. There are three styles of formal meeting minutes:

- **Report:** A full, narrative record of all discussions w/ names of all speakers, movers and seconders of any motions
- **Minutes of Narration:** Records all motions and parties with some discussion (only relevant details)
- **Minutes of Resolution:** Records wording of passed resolutions (w/out movers and seconders) using introduction: "RESOLVED THAT"

Format: Minutes are organized by agenda (what happens in the meeting) and style (how the minutes will be used). Formal meetings (and minutes) are based on Parliamentary Form (Robert's Rules of Order, sec. 60) and are either organizational or operational in function.

Meeting Minutes Example:

Anesthesiologists Associated Incorporated

Meeting Name
Insert Date

Attendees:

Item Discussed

Sub Item: Body

ACTION: Body

Formal Minutes

1. **Heading** – Name of association, Type of meeting, Date, Time, Place
2. **Attendance** – Attending members, Absent members, Guests, Chairperson, Secretary
3. **Minutes of past meeting** – Approved without correction/Approved with correction/Not read
4. **Announcements**
5. **Old Business**
6. **Motions and Resolutions**
7. **Reports, Appointments, Assignments**
8. **New Business (Action Items)**
9. **Motions and Resolutions**
10. **Reports, Appointments, Assignments**
11. **Adjournment** – Who adjourned, Time
12. **Next Meeting** – Date, Time, Place
13. **Signatures** – Secretary and Chairperson

NOTE: Locate the AAI Minutes Template on the AAI Intranet.

Informal Minutes

- **Heading**
- **Attendance**
- **Action taken and results**
- **Action planned, responsible parties and deadlines**
- **Next meeting**

Page 1 of 1

Strategies:

- **Do record:** motions and resolutions verbatim, names of speakers, movers and seconders, summaries of discussions, new information, action planned, and responsible parties and deadlines. Record every action taken.
- **Do not record:** old material, redundant information, personal comments or observations, discussion before or after meeting, discussion excluded by chairperson.
- **Work from an agenda and a copy of the last meeting minutes.**
- **Get names of all attendees.** Have a list of all committee members (and check off attendees) or use a sign-in sheet.
- **Write minutes up as soon after meeting as possible.** Have the chairperson review a draft before finalizing.

Articles in Publications

Purpose: Articles in external and internal publications, such as newsletters, web sites, journals and newspapers, provide a non-technical, non-marketing communication tool. These articles present news about products, services and people, and will announce events and plans in a "journalistic" style.

Format: Each publication will have its own requirements for submission and publication, including topic, length, organization, style and distribution. Contact the editor for formatting requirements.

Strategies:

- **Write in journalistic style.** Get the readers' attention at the beginning of the piece. Place the most important details and facts earlier in the document. Only include the details that will most interest the reader. Use short and simple language.
- **Keep articles short.** Most publications have limited space. Shorter articles are more likely to be published. They are also more likely to be read.
- **Follow all submission requirements.** Editors will not publish articles that do not meet their guidelines.
- **Prepare your article for editing.** Because of space limitations and demand for attention, editors will likely edit your piece. Make it clear to the reader (and editor) which information in your article is most important by location (most important information first) and by textual cues.
- **If you use outside sources, get written permission to use quotes and summaries.** Also get written permission for photos and artwork.

Business Grammar

English is a complex language to learn and use. It is a language that has developed and continues to change over time. The language also has multiple grammars including a verbal and written form, and a formal and informal grammar. Of course, many dialects exist as well. But correct grammar usage is important for clarity and credibility.

Parts of Speech and Other Terms

In order to discuss grammar, you will need to know the terms describing parts of speech:

- **Noun** – Names a person, place, thing, idea
- **Verb** – Expresses action, being or state of being
- **Pronoun** – Substitutes for a noun or group of nouns
- **Adjective** – Modifies/describes a noun/pronoun
- **Adverb** – Modifies/describes a verb, adjective or another adverb
- **Preposition** – Introduces a phrase functioning as an adjective or adverb
- **Conjunction** – Joins words or groups of words
- **Interjection** – Expresses emotion
- **Article** – Points to a noun

There are some other important terms describing patterns of language:

- **Subject** – Names who or what the sentence is about, simple or complex
- **Predicate (Verb phrase)** – Expresses the action/being of the sentence
- **Clause** – A group of related words containing a subject and a verb
- **Phrase** – A group of related words without a subject-verb relationship

Sentence and Paragraph Structure

Sentence Structure

Sentence can be short or long, simple or complex, and may include a variety of parts of speech. Regardless of complexity, there are some common characteristics of proper sentence structure:

- **ALL sentences have a Subject and a Predicate**
- **Both Subject and Predicate may be simple or complex (w/ modifiers)**
- **Sentences may have more than one subject and more than one predicate**

Example: Both the account representative and the manager/ responded to our request in writing.

Independent and Dependent Clauses

All clauses have a subject and predicate. **Independent clauses** can stand alone and make sense, either as a separate sentence or as part of a compound sentence with other clauses.

Example: If the contract meets with your approval, **please sign the copies and return them as soon as possible.**

Dependent clauses, while also having a subject and predicate, cannot stand alone and make sense. They MUST be connected to an independent clause for meaning. Dependent clauses always use a "subordinating conjunction" (e.g., *although, because, if, which, who,* etc.) and modify the independent clause as an adjective or adverb.

Example: **If the contract meets with your approval**, *please sign the copies and return them as soon as possible.*

Sentences may contain multiple independent and/or dependent clauses. Of course, the more complex the sentence, the more difficult it is to understand. Proper punctuation is needed when using multiple clauses together in a sentence.

Paragraph Structure

A paragraph is simply a topic sentence (main idea) grouped with support sentences (details and examples). While the topic sentence usually begins the paragraph, writers may want to modify order for emphasis or variety.

Regardless of sentence order or number of sentences, **a new paragraph begins when a new topic sentence is introduced**. Paragraph breaks have nothing to do with "breath" during reading or sentence length.

Common Grammar Problems

The three most common grammar problems for writers are *clause confusion*, *disagreement between elements* and *unclear meaning*.

Clause Confusion

Clause confusion centers on how sentences are formed and joined together. The problem lies with incorrect use of independent and dependent clauses, resulting in *run-on sentences* or *sentence fragments*.

Run-on Sentences are created when independent clauses are joined incorrectly with other clauses. The cause is usually missing punctuation and/or conjunctions.

Example: I need the insurance paperwork back as soon as possible the coverage begins early next month.

Solution: Identify the two independent clauses and join them properly. Rewrite the first independent clause in one of the following ways:

- Alone as a complete sentence with end punctuation
- With another independent clause as a compound sentence, either with a comma and a conjunction OR a semicolon
- As a dependent clause in a complete sentence, adding a subordinate conjunction

It may be easier to reorder the clauses before rewriting.

Example: I need the insurance paperwork back as soon as possible. The coverage begins early next month.

Example: As coverage begins early next month, I need the insurance paperwork back as soon as possible.

Sentence fragments are incomplete sentences caused either by missing subject/predicate OR by misuse of subordinating conjunctions.

Example: The patient uninsured at the time and now unable to make payment.

Example: Since the due date is past and collection is requested.

Solution: Rewrite the clause or phrase in one of the following ways:

- Convert the fragment to an independent clause by adding a subject/predicate or dropping the subordinate conjunction
- Link the fragment (as a dependent clause) to another independent clause

Example: The patient was uninsured at the time and is unable now to make payment.

Example: The due date is past and collection is requested.

Disagreement between Elements

Certain elements within a sentence or paragraph refer to or modify other elements. Verbs reference subject or subjects; pronouns reference antecedents. These references must "agree" in number (singular/plural), person (1st/2nd/3rd) and gender.

Subject – Verb Disagreement

Disagreement can occur when there is confusion over whether the subject is singular or plural, especially when words come between subject and the verb OR when the verb comes before the subject.

Example: The patient, along with her family, request an extension or waiver.

Solution: Isolate the subject and change the verb to match in number and person.

Example: The patient, along with her family, requests an extension or waiver.

Difficulty with Compound Subjects

When multiple subjects are joined with *and*, *or/nor*, *either/neither* configurations, there may be confusion over how to make the verb agree. Different conjunctions require different treatment. Also, *either* and *neither* may be used as indefinite pronouns and NOT conjunctions.

Examples: Dr. Williams, Dr. Smith and Dr. Jones wants to participate in this week's training. Neither Dr. Williams nor the others has their application completed. However, everyone have submitted the registration fee.

Solution: Locate each element of the subject and:

- If joined with "and", treat the subject as plural.
- If joined with "or/nor", use the subject nearest the verb to determine agreement.
- If joined with an indefinite pronoun, treat the subject as singular.

Examples: Dr. Williams, Dr. Smith and Dr. Jones want to participate in this week's training. Neither Dr. Williams nor the others have their application completed. However, everyone has submitted the registration fee.

Pronoun – Antecedent Disagreement

Confusion over number or gender may occur when a pronoun does not match the noun it references (its antecedent) or when an antecedent is assumed wrongly to be of a certain gender, reflecting gender bias. Again, compound antecedents must be treated differently depending on the joining conjunction.

Examples: The board members finished its meeting on schedule. The chairperson and members were surprised; he thought it would take longer. Every professional relishes it when he completes a project successfully.

Solution: Identify an antecedent and the pronouns that reference it.

- Treat indefinite antecedents (e.g. anyone, somebody), generic nouns and collective nouns as singular
- Treat compound antecedents connected by "and" as plural
- In compound antecedents connected by "or/nor," make the pronoun agree with the nearer antecedent

- Use gender neutral pronouns when possible

It may be easier to change the antecedent than to change the pronouns referencing it.

Examples: The board members finished their meeting on schedule. The chairperson and members were surprised; they thought it would take longer. Professionals relish it when they complete a project successfully.

Ambiguous Pronouns

There are a number of possible causes for a pronoun that does not clearly reference its antecedent:

- More than one antecedent is present
- The pronoun is not close to its antecedent or preceded the antecedent
- An implied antecedent is referenced
- "That" or "which" is used to refer to persons

Examples: Jill had a fight at work and had to meet with her supervisor, Joan, about it. It made her angry. Joan didn't know which was to blame, Jill or her co-worker. She insisted on referring it to her supervisor.

Solution: Replace the pronoun with a noun or move the pronoun closer to the antecedent. (The pronoun should never precede the antecedent.) Use "who," "whom" or "whose" when referring to persons. It may help to add an adjective to clarify the pronoun.

Examples: Jill had a fight at work and had to meet with her supervisor, Joan, about it. It made Joan angry. Joan didn't know who was to blame, Jill or her co-worker. Joan insisted on referring it to her own supervisor.

Unclear Meaning

Words or phrases that clarify the condition or action of a noun or verb are called *modifiers*. Modifiers can be verbs, adjectives, adverbs, prepositions and even articles. Sometimes it is unclear what the modifier is actually modifying.

Misplaced Modifier

When the modifier is placed too far away from what it modifies, it may not be clear what is modified or how.

Examples: The first patient rushed past the pharmacist beating the other patients to the front counter. The patient almost spent $200.

Solution: Move the modifier closer to what it modifies. Using punctuation to set off a dependent clause or phrase may also help.

Examples: Rushing past the pharmacist, the first patient beat the other patients to the front counter. The patient spent almost $200.

Dangling Modifier

When introductory or closing modifying phrases do not name what they modify, the wrong object may be modified by implication.

Example: Writing quickly, the prescription was completed without looking up. The patient left the doctor flying out of the room.

Solution: You must rewrite the sentence, naming the word/words being modified in the subject of the independent clause OR placing the word/words being modified within the modifying phrase. Simply moving the modifier will NOT help.

Example: Writing quickly, the doctor completed the prescription without looking up. The patient flew out of the room as he left the doctor.

Passive Voice

Passive voice emphasizes who/what is receiving the action rather than who/what is doing the action. This is not necessarily wrong. If the focus should be on the actor, use active voice. If the focus should be on the receiver, use passive voice.

Examples:

Passive: The results of the procedure were not adequately documented by the clinic.

Active: The clinic did not adequately document the results of the procedure.

Passive: The procedure will need to be rescheduled by the clinic free of charge.

Active: The clinic will need to reschedule the procedure free of charge.

Punctuation

Punctuation marks are used to signal meaning to the reader, showing emphasis and inflection. Punctuation problems affect flow, readability, and in some cases, meaning.

Below is a review of the basic punctuation marks including the comma, semicolon, colon, parentheses, the hyphen and dash, quotation marks, the ellipsis, apostrophes, capitalization and end punctuation.

Comma **,**

After the period, this is probably the most used punctuation mark. Basically, the comma performs two main functions: 1) It separates items in a horizontal list; 2) It sets off dependent clauses and phrases of various types.

Example: However, the comma is versatile, and it can be used in lists, clauses, and phrases.

Semicolon **;**

The semicolon really only has two proper uses. First, it joins related independent clauses in compound sentences (without a conjunction). Second, it is used to separate items in a series that include punctuation. The semicolon is NOT interchangeable with the comma.

Example: It seemed that it would last forever; it didn't.

Example: The world leaders participating in the talks included George Bush, President of the U.S.; Tony Blair, Prime Minister on England; and Jacques Chirac, President of France.

Colon **:**

A colon is used after a complete statement to introduce one or more directly related ideas, including lists, quotations, directions or other comments detailing the statement. It is NOT correct to use the colon with an incomplete phrase. The colon is also used to punctuate business salutations and time of day in numeric form.

Example: Mount Rushmore features the faces of four presidents: Washington, Jefferson, Lincoln and Theodore Roosevelt.

Example: The recent poll taken of our students proves one thing: they don't like lecture courses before 7:30 a.m.

Example: Dear Mr. Jones:

Parentheses **( )**

Parentheses, always used in pairs, set off non-essential or tangential material included in a sentence including examples, dates, sources, or subordinate ideas.

Example: We always celebrated my great-grandfather's birthday (September 29th) as though he were still with us.

Hyphen **-** and Dash **--**

The hyphen and the dash are separate and distinct markings. Technically, the hyphen is not punctuation but part of a word. The hyphen and dash may NOT be used interchangeably.

A **hyphen** is used to create compound words and to break up a single word at the end of a sentence. In the latter case, words should be divided between syllables or between compound words. Single syllable words should NOT be divided. Also, divided words should not end a line with a single letter or begin a line with less than three letters.

Example: Despite my brother-in-law's complaints, I enjoyed Williamsburg frontier-village life.

The **dash** is used to set off and emphasize an explanatory comment or detail. A colon or parentheses may also be used for this function, but with less emphasis. Depending on your word processor, the dash is either a single line longer than a hyphen or created by joining two hyphens.

Example: The true meaning of the message -- love conquers all -- remains a central theme throughout the piece.

Quotation Marks " "

Quotations marks are used to enclose direct quotes, with *commas* and *periods* inside the closing quotation mark. *Colons* and *semicolons* go outside the quotation marks. *Question* and *exclamation marks* are enclosed if they are part of the quoted material. Quotation marks can also be used to indicate special usage of a term or irony.

Example: "All I want to know," she asked, "is why we are here?"

Example: I don't know how much more "progress" I can stand.

Ellipsis . . .

Made of three spaced periods, the ellipsis indicates deleted words in a quotation or to suggest unfinished thoughts. There is no space before or after the ellipsis. A period follows the ellipsis used at the end of a sentence.

Example: The report stated that "measurements taken under controlled conditions . . . provided for more accurate data collection."

Apostrophe '

The apostrophe is primarily used to show possession, to denote contractions, and to pluralize numerals and letters. In the case of possessive forms, the following rules apply:

- Add an *'s* for nouns that do not end in *s*, or singular nouns that end in *s*.
- Add an *'* for nouns that are plural and end in *s*.
- For joint possession or compound nouns, add the *'* (with or without the *s*) with the last element only.

- Use the *'s* with indefinite pronouns *(everyone's, someone's, anyone's, something's)*, but not with definite pronouns *(its, whose, his, hers, ours, yours, theirs)*

Example: John and Lois's claim wasn't relevant in the 1980's. An idea like theirs wouldn't matter until much later.

Capitalization

Capital letters are used to signal proper names (people and organizations), words beginning a sentence, and major words in titles and subtitles. Capitals letters are also used with quotes UNLESS the quote is blended into the sentence. Capital letters should NOT be used for common nouns, words after a colon (unless an independent clause - then it is optional), or blended quotes.

Example: "The XYZ movement," John exclaimed, "is out of control! Citizens of the United States must act now!"

End Punctuation .?!

End punctuation does just that; it ends a sentence. The period is used to end all sentences except those denoting a question or exclamation. The question mark denotes a question, either direct or rhetorical. The exclamation point denotes excitement or emphasis. It also sets off interjections.

Example: Hey! What are you doing?

Addresses

The rules for punctuating addresses are simple, but "inside addresses" (used in formal business letters) are handled differently than addresses used within a body of text. For "inside addresses", format and punctuate the same as the mailing label.

Example (Inside Address):

Dr. Jillian Gerome
Wilson Medical Center
1234 SE Hospital Way
Portland OR 97208

For addresses within the text, use commas to separate the major sections of the address.

Example (Within Text): Dr. Jillian Gerome practices at Wilson Medical Center, 1234 SE Hospital Way, Portland, Oregon 97208

Spelling

One way to improve spelling is to pay attention to those spelling patterns that give us trouble. Below are some common spelling rules that seem to give writers problems. (This is not a comprehensive list of rules, but focuses on common problem areas.)

Plurals

- Add *s* to most words *(computers, offices)*
- Add *es* to words ending in *s*, *ch*, *sh*, and *x* *(boxes, watches)*
- Add *s* to words ending in *y* after a vowel and to all proper names ending in *y (trays, Kennedys)*
- Add *ies* to words ending in *y* after a consonant *(companies, pennies)*
- Add *s* to words ending in *o* after a vowel *(videos)*
- Add *es* to words ending in *o* after a consonant *(heroes)*
- Add *s* or *es* as appropriate to the major word in hyphenated compound words *(mothers-in-law)*

Some exceptions: children, criteria, data, media, men, women

"*I* before *e* ..." *(achievement, patient)*

- "...except after *c*..." *(perceive, receipt)*
- "...and in the sound *ay* as in hay *(neighbor, weigh)*"

Some exceptions: either, neither, height, foreign, leisure, seize

Prefixes and Suffixes

- Adding a prefix usually does NOT change the root *spelling (misspent, unnecessary)*
- Drop the silent e when adding a suffix beginning with a vowel *(advancing, believable)*
- Keep the silent e when adding a suffix beginning with a consonant ... *(achievement, likeness)*
- ...unless the e follows a vowel *(arguing, truly)*
- Double the consonant when adding a suffix beginning with a vowel if:
  - the final consonant is preceded by a single vowel and
  - the consonant ends a stressed syllable or one-syllable word *(beginning, committed, occurrence)*

Some exceptions: changeable, mobile, dying

Alternative British Spelling

British/Canadian spellings may vary *(cancelled, colour, cheque, centre, defence, realise)*

- Check dictionary if writing for an audience overseas

There are a variety of tools available to help spellers check their work including dictionaries, spelling dictionaries, and *writing assistants* (built into word processing and desktop publishing tools)*.* The Miriam-Webster Dictionary is available to use free on-line at http://www.m-w.com/dictionary.htm It may also be helpful to keep track of words that you often misspell, perhaps in a list, to reinforce proper spelling of these "trouble" words.

Diction

Diction refers to word choice and order. Diction affects meaning, tone and emphasis. Proper diction uses clear, precise language that clarifies for the reader what you really mean. Improper diction makes your message less effective and may alienate the reader.

Barriers to Meaning

Misused words can confuse or misdirect readers. Be cautious of using long, fancy words, unless they are the norm for both you and your readers. There are also *commonly confused words* that sound or are written in a similar way. (A list is available on-line at http://puck.topcities.com/workshop/osbwrds.htm.)

Non-specific nouns, like "area", "factor", "issue", "problem", "thing", carry only general meaning. Using a concrete noun that points to a specific object will mean more to readers and avoid ambiguity.

Slang, regional expressions and *figures of speech* may be confusing to readers. These also are less formal and may be perceived as unprofessional. *Jargon* should only be used when appropriate to the audience and context.

Euphemisms and *other pretentious language* may alienate some readers, as may *sexist language.* Again, concrete language appropriate to your audience will be more effective and better received.

Barriers to Tone

Tone refers to the attitude or mood communicated by the writer. Tone is primarily set by diction choices in *formality* of language and word *connotation.*

An improper level of *formality* affects how your message is received. It also reflects on your professionalism. *Contractions, slang, figures of speech* and *casual references to the reader* may make your document too informal. *Acronyms* used casually without explanation may also create an informal tone. However, *proper or strict language* may create the opposite problem, a formal tone where one is not warranted.

Words or phrases carry more meaning than just their *denotations* or strict definitions. Words and phrases also have *connotations* or associated emotions and images. (For example, "The request was processed quickly" has a different connotation than "The request was processed hastily.") Even the order in which words are presented may change the connotation. Finally, *figures of speech* or *clichés* may generate a different response than the one intended.

Barriers to Emphasis

The most important ideas within a document can be emphasized in several ways: position within the document, sentence construction, word use, intensifiers, punctuation and other mechanical devices (such as italics, bold, capitalization). However, over emphasis or emphasis on the wrong concepts will weaken your focus.

The first and last *position* within a document, paragraph or sentence gets the most notice. The choice to *frontload or backload* depends on how accepting the audience will be to the writer's message. Misplacement of key ideas will deemphasize them.

Sentence construction, including sentence length and complexity, can either highlight ideas or hide them. *Active* and *passive voice* should be used correctly for proper emphasis as well.

Repetition of key words and *intensifiers (very, really)* can be an effective way to emphasize ideas. But over use of these will put readers off. Varying *multiple terms* for the same subject can also be effective, but the first term has the emphasis and sets the tone.

Business Writing Assessment #1:

Correct each sentence by changing a word, phrase and/or punctuation. Each sentence has one error.

The sales manager and her team meets every Thursday.

Oscar did good in his interview yesterday.

Each of us were scheduled to take the training.

This commendation is for my partner and I.

How quick the time passes on Fridays.

This new software has a problem mailing features do not work.

The supervisor, not the technicians, have been disciplined.

It is us clerks who work hard.

He took the motion off of the table.

Just between you and I, this project is harder that we thought.

Complaining loudly, the bill was torn into bits by the angry customer.

There is only four days until the deadline.

Neither Sanchez nor I are to contact the client.

Since they were unable to contact us in a timely manner.

How will you be effected by the announced merger?

Neither of the customers have returned for reimbursement.

It was I whom called.

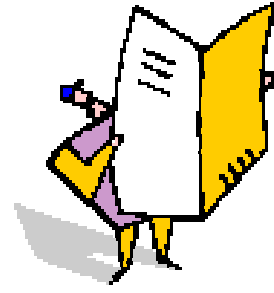After 15 years working together, they were real close colleagues.

Li was confident that the employee of the month was her.

None of the managers offered his support.

(See Appendix A for answers.)

This page is intentionally blank.

Proofreading, Revising & Editing

Proofreading

Before sending or publishing your document, locate and mark errors and needed changes in a document. Do NOT stop to correct them. (You will revise and edit in separate steps.)

General Strategies:

- **Approach with *fresh eyes*.** Wait before proofing or use another proofreader.
- **Know why you are proofreading**. Proof ideas and flow for revision; proof sentence structure and grammar for editing.
- **Proofread for the audience.** Look for what the reader will stumble on or miss.
- **Mark the problems; don't fix them.** Proofreading is not revision or editing.
- **Proof multiple times.** Proof at least once for revision and once for editing.
- **Look for necessary changes only.** Don't create a new document.
- **Read both silently and aloud.** This tests both meaning and flow.
- **Proofread in *chunks*.** The order typically doesn't matter.

Proofreading for Revision (1st Proof)

Check content and order for clarification or restatement. The writer "becomes" the reader, asking, "Does this make sense? Does it work?"

- **Read for an overview.** Does the document present ideas effectively and appropriately? Does the document *flow*? Is *formality* appropriate?
- **Find the main point or thesis.** Does it match the purpose you intended?
- **Find the evidence or details.** Do these support the main point?
- **Check paragraph *order* and *weight*.** Is order and development effective and appropriate?
- **Proof individual paragraphs for relevance and transitions.** Are all paragraphs needed and connected?
- **Repeat as necessary.**

If your document needs major revision, revise BEFORE proofreading for mechanics. Major changes in content will probably change grammar and punctuation and may change diction. If you do make major revisions, proof again for content.

Proofreading for Editing (2nd Proof)

Find sentence-level problems. Spot awkward or unclear sentences, and mechanical (grammar, punctuation, spelling) errors.

- **Proofread at least twice,** once for clarity and once for mechanical problems.
- **Be aware of your problem patterns as a writer (spelling, punctuation, sentence structure, etc.).** Check for these first.
- **Make sure each paragraph has only one topic sentence.**   Find the topic sentence within each paragraph. Identify support sentences. If the topic changes, start a new paragraph, regardless of paragraph length.
- **Quickly cover grammar basics:** Complete sentences (and ideas); Agreement between elements; Clear and appropriate modifying phrases; Correct punctuation.
- **Read aloud to catch grammar and punctuation problems.** However, this may not help if you are writing in a second language.
- **Check spelling separate from grammar & punctuation.** Read sentences backwards to check spelling. Use a dictionary as necessary.

Proofreading Tools

Of course, the best proofreading tools are dictionaries and grammar guides, which can be used to verify fixes you have already identified and revised. But they cannot help you organize your proofreading or locate problem areas. There are some other ways to get proofreading assistance:

Writing Assistants

Most word processing, e-mail and publishing software includes a spell- and grammar-check tool. These are very good at finding common spelling and grammar problems. However, writing assistants do not catch all spelling errors and frequently make grammatical misdiagnoses. **Use writing assistants to locate likely errors, but do not use *autocorrect*.** Instead, use the writing assistant to supplement your own proofing.

Peer Review

Co-workers can be an excellent resource as proofreaders, especially evaluating content. They already understand (generally, at least) your purpose and audience. When using peers, ensure confidentiality (some documents should NOT be peer reviewed) and clarify your timeline and preferred method of feedback.

Business Writing Assessment #2:

Proofread the document below. Mark all errors to be fixed later.

Dear Bob;

This letter is being written to clarify your needs in processing claims and billing requests. Many carriers use a variety of policies in regards to medical and payment claims.

In order to meet your organizations claim processing needs it would be helping for us to know those policies for the following components.

1. Global medical service periods for both major and minor procedures.
2. Multiple treatment guideline in terms of ranking procedutes
3. pro-rated % for primary and secondary procedures
4. modifiers that are recognized and can be used for additional procedural explanation.
5. Medical and officesupplies that will be reimburse for in-office procedures

 Your reply regarding these polices will help AAI accurately file claims to you by knowing your billing requirements, it should help eliminate unnecessary claim denials and request for follow-up that is costly and time consuming for both of us.

Yours truly,

(See Appendix A for answers.)

This page is intentionally blank.
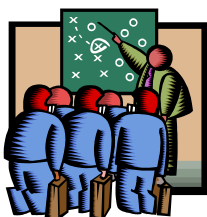
Revising Strategies

After you have proofread for content, you will need to consider changes to *focus*, *content*, *organization* and *audience appeal*.

Focus

Does the document communicate your main ideas clearly and effectively? If not, consider the following revisions:

- **Clarify the introduction of main "thesis".** Often, you can give your document more focus by improving your introduction. Using PAT, determine how much background the audience needs and how best to lead the reader to your topic sentence or sentences.
- **Check for competing ideas.** If your document does have more than one emphasis, omit the secondary topics. Or you may need to break your document into two or more separate documents, each with its own focus. (Remember the "Rule of Ones"?)
- **Delete unnecessary material.** Omit any content that does not clarify or support your main focus. This includes text, graphics and even auxiliary materials such as notes, headers/footers, etc. Keep your business documents brief and to the point.

Content

The content should emphasize your main topic, major points and supports. Keep your audience's attention on your persuasive or informative message.

- **Make your main ideas easy to find.** Organize your message in a way that is logical and easy to follow. Use clear and effective language to keep the reader tracking your ideas.
- **Add facts, details, examples, and definitions** to strengthen your supports and involve the reader.
- **Rethink central argument/insight** if your message seems too hard to follow or accept. (Only do this if absolutely necessary.)

Organization

Sometimes your content is good, but the way you present it is a problem. Try revising your document's organization to improve effectiveness.

- **Add/sharpen topic sentences.** Ensure that each paragraph has a clear, strong topic sentence.
- **Move blocks of text.** Generally, the more important information goes earlier in the document. However, you can easily "test" emphasis and clarity by moving text within the document. With word processing, you can always "undo".

- **Re-paragraph as needed.** Start a new paragraph whenever you introduce a new topic sentence. If you have paragraphs that are too long or too short, consider changing, adding or removing topic sentences. (Paragraphing without considering topic sentences may confuse the reader or break the flow of ideas.)

Point of View/Person

A specific content problem many writers face is shifting person or point of view. Generally, you should **maintain consistent point of view throughout your document**. However, there are reasons to shift point of view. For example, you may want to include a set of technical instructions (2nd person) within a business document primarily describing a product or service (3rd person). **If you do shift point of view, let readers know you are making a shift, using both textual and structural cues.** By keeping these sections separate and introducing the shift, the reader will not be confused or "jarred" by the change.

Audience Appeal

As a writer, you must motivate the reader to begin and continue reading the document. Even when the audience wants to or has to read your message, you can encourage full attention to content through good use of language and form.

- **Let the reader know why they are reading.** Give the reader information about the document's purpose and value, including benefits of using the document and consequences of not using it. Present this early in the document or in a separate introductory document. *Example: Enclosed is the information you requested, along with guidelines on how to proceed with your application.*
- **Use appropriate tone and language.** Use the level of formality and technical language that best suits your audience. Ensure that "negative" language is used only when necessary. Default to direct meaning and formal tone (unless writing personal narratives and correspondence). Generally avoid jargon and slang. Maintain a professional tone throughout the document.
- **Make your document "easy" to read.** Use clear language and simple organization to help the reader progress through your document. Include effective navigation tools such as *roadmaps*, *signposts* and *cues*.
- **Get feedback from your audience.** Consider using a "test" audience to prescreen your complete document or a portion of your document. Request feedback on your completed document for future versions.

Editing Strategies

After revising, proof again for editing needs. Then look at editing for *linking, movement, transitions* and *mechanics*. Editing should NOT make any major changes to focus, main ideas or major organization.

Linking

Link each part of the document together to keep the reader progressing through the document. Some important methods to consider:

- **Use key words to get the readers attention and identify important concepts.** Use repetition for emphasis, but use variety to avoid monotony. (Generally, repeat names of products and services, but vary names for people and places. For example, you can use names, titles and pronouns to refer to the same person or group within the document.)
- **Maintain parallel structures throughout the document.** Similar information should be presented in similar ways. This includes both text and graphics. For example, if one set of patient data is presented in a table form, other patient data should also be presented in table form.
- **Check for consistent style in language** between paragraphs/chapters/sections, including subject identity and point of view.

Movement

Movement is really about the flow of ideas between paragraphs. There are several things you can do to ensure good movement:

- **Check your paragraphs.** Each paragraph should have a clear topic sentence, usually followed by supports. You also need transitional sentences or phrases between paragraphs.
- **Arrange paragraphs appropriately throughout the document** by time (chronological, narrative, process); space (descriptive, setting); drama (building to climax, backloaded); or logic (argumentative, essay).
- **Try moving paragraphs before rewriting them**, but remember that transitions will then also need to be changed.

Transitions

Transitional sentences, phrases and words help guide the reader through the document.

- **Add transitions as needed.** Often, only a word or phrase is needed to move readers between paragraphs or sections. Sometimes, transitional paragraphs or sections may be required for major shifts in content.
- **Choose appropriate phrases based on the type of transition you imply:**

  - Addition (*and, also, further, in addition to, moreover, next, too*)
  - Compare (*also, in the same manner, in this way, like, likewise, similarly*)
  - Contrast (*although, but, even though, however, in contrast, nevertheless, still*)
  - Summary (*In conclusion, in other words, in short, therefore, to sum up*)
  - Relation [time, order, place] (*after, as, during, finally, later, when, first, second, next, last, above, beyond, farther on, near, opposite*)
  - Logic (*as a result, consequently, if, since, so, therefore, thus*)

Mechanics

After completing all other editing, **correct grammar, then punctuation, and finally spelling**. These edits should be done last because changes in content, paragraphing, linking and transitions all may require additional changes in grammar, punctuation and spelling.

Electronic Communication

Appropriate electronic communication is important for many reasons including legal restrictions and implications, adherence to AAI policy, professionalism and effective communication.

Legal Restrictions and Implications

There are many laws specifically governing the use of electronic communication. The CAN-SPAM Act, the section of the VAWA concerning cyberstalking, and elements of HIPAA all restrict use of electronic communication. Other laws cover on-line fraud in various forms. Recently, Congress has taken up several comprehensive measures meant to review on-line privacy.

While these laws do not directly affect most corporate e-mail and Internet users, issues of non-disclosure, copyright and liability could affect employees daily. It is important to understand the responsibility all users of e-mail and other electronic communications have within the corporate structure.

Liability: Risks

There is a level of liability that all employees assume when they write and send any document, including electronic communications:

- **"Technical" or Product Liability** assumes that the product or service you are writing about does and is what you say it is. Because of this, your communication is open to several types of liability: *Negligence, Breach of Warranty,* and *Strict Liability in Tort(e).*
- **Marketing Liability** concerns both accuracy of information used in marketing and the *expressed warranty of description.* The *UCC* or *Uniform Commercial Code* has primary governance for marketing communications.

- **Intellectual Property Law** governs copyright, trademark and patent rights. Employees need to consider these issues when creating and using documents.
- **Other Areas of Liability** relate not to how a product or service is described, but how information is used within and without an organization.
    - **Privacy** is especially important in health care and financial services. For example, HIPAA governs how patient information is collected and stored. Transmitting patient information, then, becomes a major concern for writers in the health care fields.
    - **Financial information** is protected is many cases, especially concerning customer transactions.
    - **Employment records** must be maintained, but can only be shared within and without a company under strict guidelines.

Employees should contact their manager or human resources for specific information regarding their liability for writing on the job. However, there are some steps all writers can take to protect themselves and AAI of liability risk.

Liability: Protections

There are three generally accepted methods of protecting yourself and AAI from liability generated from electronic (and other) communications.

- **Accuracy** is the primary protection for technical and marketing liability and offers some protection for other liability as well. The writer can ensure accuracy in several ways:

    - **Check for clear interpretations and findings.**
    - **Do not suppress knowledge or data.**
    - **Do not exaggerate claims or data.**

- **Ownership** of intellectual property usually allows for full use. **Use material already created and owned by the company** whenever possible, and **confirm copyright, trademark and patent rights** before using material.
- **Permission** to use or release information offers some protection for intellectual property use and privacy issues. **Get written permission before using or releasing information**.

While these methods do offer some protection from liability, they do not guarantee protection nor do they necessarily prevent legal action. It is better to avoid potential liability risks altogether by using some common sense techniques.

Liability: Avoiding Problems

All writers should strive for accuracy and an ethical approach to their writing. However, there are some specific methods writers can use to avoid legal and liability problems.

- **Be factual and precise.** Information should be accurate, but should also be clearly stated.

- **Know your audience.** Evaluate your readers' needs, expectations and abilities. This will help you prepare documents appropriate for a "reasonable person" to use.
- **Document your work.** Cite your sources within your work. Keep notes, copies of correspondence and data records. Be able to provide a paper trail (or electronic trail) as needed.
- **Get approval of your work.** Request a "sign off" from managers and/or clients. Get feedback from peers. Consider a practical test of your document with a sampling of your target audience.
- **Use waivers/consent forms** to use or release information.

AAI Company Policy

Most companies have a written policy for employee use of e-mail, Internet and other electronic collateral. This policy should be available through Human Resources, IT or in the Employee Handbook.

Generally, all computers, networks and software are owned and controlled by the company. This usually means:

- **Use of the computer network is limited by company policy.**
- **E-mail and Internet usage is for business use only, although some personal use is often permitted.**
- **Access may be limited or terminated by the company.**
- **Users may be monitored and recorded by the company.**

Additionally, any content created with a company's collateral is also owned and controlled by the company. Some things to remember when using e-mail and Internet:

- **Content (e-mails and attachments) is owned by company.**
- **Content is usually stored or backed up.**
- **Content may be accessed by officials for business use including disciplinary action/termination.**

Professionalism and Effectiveness

It is worth taking the time to ensure that your e-mail and web content is properly written, delivered and stored. Because e-mail and the Internet have become the easiest and quickest methods for business communications, these become a primary mode by which your professionalism, and that of your organization, will be measured.

Poorly written and/or poorly managed electronic communication reflects on you and your company's reputation. It also may hamper your audience's understanding of your message. Inappropriate or flawed use of electronic communication affects delivery and flow of communication, the need for additional resources and time to handle problems, and the willingness of others to open and read electronic communications.

Well executed electronic communication works better to get your message clearly and effectively to your reader.

Electronic Etiquette

Common E-mail Problems

A 1997 article by John Edwards summarized a survey of e-mail users. Despite advances in e-mail technology, the problems common then are still common today. These problems are:

- Address errors
- Long messages or attachments
- Misleading or vague subject lines
- Inappropriate content
- Lack of discretion in responses
- Inappropriate copying and forwarding

> Source: John Edwards, "The Six Most Common Mistakes in Sending E-mail," **Bottom Line Business**, October 1997.

Summary of Etiquette Guidelines

E-mail is like any other business tool. Effective, professional use ensures productive communication. Utilize these e-mail etiquette practices:

- Keep e-mail messages concise, professional and relevant.
- Do not e-mail complex, sensitive or confidential messages.
- Confirm recipients' interest, involvement, and addresses.
- Use a clear *Subject* line.
- Quote sparingly.
- Send attachments only when necessary.
- Use discretion when replying to e-mail.

- Do not *flame.*
- Do not send/forward inappropriate material.
- Proof your message before sending.
- Revise and edit as needed.

Strategies for Successful E-mail

Although e-mail "feels" conversational, it requires the same thoughtful approach as other business documents.

- Use **P**(urpose) – **A**(udience) –**T**(echnique) process.
- Compose off-line.
- Take time to proofread and edit.

Remember: Poorly written and/or managed electronic communications reflects on you and your company's reputation. Well executed e-communication works better to get your message across quickly and effectively.

Appendix A

Answer Key for Assessments

Assessment #1 **Practice Grammar & Diction Quiz**

The sales manager and her team **meets** every Thursday. **(meet)**

Oscar did **good** in his interview yesterday. **(well)**

Each of us **were** scheduled to take the training. **(was)**

This commendation is for my partner and **I**. **(me)**

How **quick** the time passes on Fridays. **(quickly)**

This new software has a problem**()** mailing features do not work. **(; OR start new sentence)**

The supervisor, not the technicians, **have** been disciplined. **(has)**

It is **us** clerks who process the submitted forms. **(we)**

He took the motion off **of** the table. **(Omit of)**

Just between you and **I**, this project is harder that we thought. **(me)**

Complaining loudly, the bill was torn into bits by the angry customer. **(Rewrite sentence to clarify who is complaining.)**

There **is** only four days until the deadline. **(are)**

Neither Sanchez nor I **are** to contact the client. **(am)**

Since they were unable to contact us in a timely manner. **(Omit since)**

How will you be **effected** by the announced merger? **(affected)**

Neither of the customers **have** returned for reimbursement. **(has)**

It was I **whom** called. **(who)**

After 15 years working together, they were **real** close colleagues. **(very)**

Li was confident that the employee of the month was **her**. **(she)**

None of the managers offered his support. **(Omit his)**

Assessment #2

Dear *Bob* **(too informal)** *;* **(use colon, not semicolon)**

This letter is being written to **(passive voice)** clarify your needs in processing claims and billing requests *in regards to* **(diction)** your policies.

In order to meet your *organizations* **(needs apostrophe)** claim processing needs **(comma)** it would be *helping* **(verb form)** for us to know those policies for the following components. **(colon, not period)**

(Bulleted list, not numbered. Keep end punctuation consistent)

6. Global medical service periods for both major and minor procedures.
7. Multiple treatment *guideline* **(plural)** in terms of ranking *procedures* **(spelling)**
8. *pro-rated* **(capitalize, do not hyphenate)** *%* **(spell out, not symbol)** for primary and secondary procedures
9. *modifiers* **(capitalize)** that are recognized and can be used for additional procedural explanation.
10. Medical and *officesupplies* **(spaced)** that will be *reimburse* **(verb form)** for in-office procedures

¶Your reply regarding these polices will help our firm accurately file claims *to you by knowing your billing requirements, it* **(run-on sentence)** should help eliminate unnecessary claim denials and *request* **(plural)** for follow-up that *is* **(verb form)** costly and time consuming for both of us. **(Request for action needed)**

Yours truly **(diction)**,