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WRITING ROUTINE MESSAGES

And, of course, you have the commercials where savvy businesspeople get ahead by using their Macintosh computers to create the ultimate American business product: a really sharp-looking memo.

—**Dave Barry**, humorist and columnist

As earlier chapters have emphasized, written communication is an important part of a manager's job. Studies of business professionals with varying years of experience have consistently found that they spend a significant portion of their time at work writing e-mails, memos, letters, reports, and proposals.¹ Writing is considered a "threshold competency" or a "tool skill"—a necessity for managerial functioning.² Paul Glen, author of the award-winning book *Leading Geeks*, observes that "the most important thing you can do to ensure you have a vibrant career for years to come is to learn to write well. . . . Whether you are an executive, project manager or hard-core technologist, writing is the key to your future."³

E-mails, letters, and memos are probably the forms of written communication that benefit most from the strategic considerations we discuss in this text. The conciseness of these messages and the relatively detached atmosphere in which managers usually write them can help ensure that the principles of reader adaptation and strategic analysis are used.

Unfortunately, too many managers take routine writing tasks for granted. Perhaps because managers write so many of them, e-mails, letters, and memos frequently can become impersonal things that convey information in a lifeless manner. Rather than being responses to a specific communication situation, many messages merely respond to types of situations. Thus, some managers write stock answers to claims and ignore or at least discount the factors making the claim unique and calling for adaptation.

Additionally, because e-mails, letters, and memos are such common and relatively informal media, managers often become lax regarding the quality of their messages. One study of correspondence in thirteen industries found punctuation errors in 43.7 percent of the correspondence surveyed, word usage errors in 52.2 percent, and sentence

construction mistakes in 45.3 percent.⁴ “So what?” you might think. “Who cares about surface errors, so long as the message gets across.” In response, a mounting body of research indicates that grammar, mechanics, and sentence-level errors can indeed potentially damage a manager’s credibility.⁵ Perhaps because routine correspondence is so bound by conventions of format, the language used in it poses another problem. These media can easily become choked with stock phrases and clichés that turn the message into a ritual utterance: “as per your request,” “reference your letter,” “herewith acknowledge receipt,” and “please do not hesitate to contact me.” Such documents often communicate very little except a negative impression of a stuffy, impersonal author.

This chapter takes a strategic approach to e-mail, letter, and memo writing, emphasizing ways in which a writer can adapt correspondence to fit as nearly as possible to the needs of the intended reader. The chapter also offers two general patterns for correspondence situations you are likely to face as a manager and specific types you can use for guidance in certain cases. Of course, use these models as a foundation only; as suggested in Chapter 2, each message a manager writes needs to be adapted to fit the audience and the situation.

AUDIENCE ADAPTATION

In many writing situations, a writer may not know the reader of the message very well. Indeed, the writer may not know the reader at all. Thus, managers must carefully consider the strategies of messages they send in order to achieve the maximum benefit. Fortunately, we can recognize some writing strategies that suit most correspondence situations.

The “you” attitude is the basis for the organizational strategies this chapter details. Writers who have this attitude prepare messages matching their readers’ interests. They do this by putting themselves in the reader’s place. A writer with the you attitude begins by asking herself, “How would I feel if I were this person in this situation? What would I want to read in this message?”

The you attitude requires empathy, the ability to understand another’s feelings; we show empathy when we say to a colleague who is having trouble solving a problem, “I know what you mean,” or “I know what you’re going through.”

STOP AND THINK

1. When you are thumbing through a magazine, what makes you stop and read an article?
2. Why does a particular billboard message or TV commercial catch your attention?
3. What is the implied strategy for capturing the attention of the intended reader?

Basis of the You Attitude

The great American film director Billy Wilder said, “An audience is never wrong.” Furthermore, every audience is unique. Just as you would not give the same birthday gift to every member of your family, you should not give the same message to every employee. Audiences want to know that you understand their specific needs and concerns, so you must address them personally.

The you attitude, which is reader oriented, grew out of an awareness that most people, especially when they are

involved in business matters, are likely to be looking after their own interests. In reading a message, they want to know how they can gain or at least how they can minimize a loss. Thus, when communicating in a positive situation, good writers seek to increase the positive impact of the news. In a negative situation, writers seek to reduce negative impact while stressing reader benefits.

Few people have trouble using the you attitude in positive situations, but some balk at using it in negative ones, fearing that the you attitude shows weakness. This view is a misperception.

Anticipating Questions

To be effective, writers should anticipate the questions a reader might have. Thus, as they write, they ask themselves just what the reader might be uncertain about and then answer the uncertainties so no additional correspondence is needed. Remember the five Ws: who, what, when, where, and why.

Stressing Reader Benefits

Arguably, the most likely audience question is “What’s in it for me?” or WII-FM. With the you attitude, the writer always strives to show the reader how she benefits. This is not to say that the writer gives in to the reader. Rather, the writer designs the message to either capitalize on or overcome the reader’s attitudes about the writer as well as the issue at hand. Thus, a businessperson trying to collect on a past-due account might stress that the reader needs to pay the account balance to retain credit privileges at the store as well as an overall good credit rating. The potential for success in this case is far greater than if the credit manager had stressed only the company’s interest by writing of its need to receive payment.

Avoiding Negatives

A writer should avoid negatives and words with negative connotations, especially in negative situations. These words have a way of jumping off the page and putting the reader on the defensive. Watch, especially, words such as *unfortunately*, *claim*, *allege*, *problem*, *damage*, and *regret*. A negative word can affect a reader’s perceptions so much that he will not be able to read the rest of the message objectively. Stressing the positive, on the other hand, will improve the writer-reader relationship and make it more likely that the writer’s goal will be reached.

An easy way to find positive words for a negative message is to say what *will* happen rather than what *will not* happen. So instead of telling a customer, “Unfortunately, we can’t meet Friday’s deadline,” one could say, “Your shipment will arrive on Monday.” As described in the previous chapter, Holiday Inn Express uses this strategy well. Instead of warning hotel guests not to steal the towels from the rooms, a card simply announces, “Should you decide to take these articles from your room . . . we will assume you approve a corresponding charge to your account.”

Note the positive terms in the message: “take,” “approve.” Guests are not likely to be offended or insulted by this announcement.

Here is another example of a negative message couched in positive words. In early 2017, Wells Fargo agreed to pay \$110 million to settle a class-action lawsuit related to the creation of up to 2 million sham accounts that customers didn't request or authorize. On April 5, a full-page letter signed by Timothy J. Sloan, the CEO and president of Wells Fargo, appeared in the *Houston Chronicle*. It began with, "Thank you," not "We were wrong." The letter continued in the same positive tone, listing the "progress" that the corporation has made to "make things right for our customers . . . and ensure we always put our customers' needs first." The letter ended by announcing to readers that the corporation was building "a better bank."⁶ The language in this message put a positive spin on bad news.

Nonverbal Elements and the You Attitude

The you attitude shows itself in a variety of ways, some more obvious than others. One of these ways is metacommunication. Without reading a word, an individual receiving a message can tell a lot about the sender and the sender's attitude toward the reader.

Both the stationery chosen for correspondence and the keying job send messages to readers. A positive letter marred by smeared or pale print, typos, stains, hand corrections, or a cheap grade of paper creates static in the communication channel. While the written message says that the writer cares, the physical elements of the medium suggest indifference at best. On the other hand, error-free letters with crisp black print on white, high-cotton fiber-content bond paper suggest professionalism and respect for the reader's feelings.

Similarly, the nonverbal elements of e-mail can make a positive or negative impression on the reader. A writer implementing the you attitude will send concise e-mails. How concise? Most readers prefer them limited to one screen in length so they do not have to scroll. Brief paragraphs with spaces between them improve readability. If the e-mail is a reply or the latest in a series of exchanges, the writer should delete all but the most recent message being responded to. Formatting is often lost when a reader opens an external e-mail, so the writer should limit the use of tabs and other design and formatting elements.

Diction

The you attitude also influences a message's wording. If the reader's interest is of central concern, show this by making the reader central as well. If the reader is asking, "What's in it for me?" she will have a hard time determining that if you write exclusively about yourself, using *I, me, mine, or we, us, our, ours*. A better focus is on *you, your, yours*. Thus, rather than saying, "We are sending the samples of the ads we worked up for Reality Industry's new pumps," a writer should substitute, "You will soon receive three samples of the magazine ads for your new pumps." The revision makes the reader rather than the writer the focus of attention.

ORGANIZATIONAL STRATEGIES

Thus far, we have looked at a variety of ways in which a manager can personalize messages to make them better understood and received by readers. However, one key element

remains: overall strategy. The suggestions given so far for signaling concern for the reader will fall short if you do not organize the message in a manner that anticipates reader reaction. Let us look at two basic strategies that, when used properly, can appropriately address reader reaction. The strategies deliver the message while promoting a positive image of the writer.

Direct Strategy

The direct strategy is used for messages conveying good news or neutral information. Someone receiving good news is pleased after reading it and appreciates having the good news as quickly as possible. However, if the message's main idea is buried in the middle or is located near the end, the reader, who probably began with some enthusiasm, loses interest and becomes frustrated at wasting valuable time searching for the main point. This frustration can affect the reader's attitude toward the writer: "Why can't she come right to the point?" Thus, such a message in a positive situation with lots of potential for building goodwill can instead weaken and even destroy the positive impact.

Opening

A better strategy is to put the main point first. A brief introduction might be needed to orient the reader, but this introduction should not delay the presentation of the main point. An easy way to remember this principle is the acronym BIF or big idea first. Beginning with a purpose statement answers the reader's question, "Why is this person writing to me?"

Body

A message using the direct strategy next provides the necessary supporting details: the reasons for the decision, background or history, specifics about the situation, or the procedures the reader needs to follow. Of course, these details promote the writer or the company she represents, especially when the message grants a favor.

Close

A direct message has a positive ending. Among the choices can be an offer to help, a statement of gratitude, or a call for any further action the reader needs to take. Of course, closing with a goodwill statement as simple as "Thanks" leaves a positive impression.

Indirect Strategy

Unfortunately, not all business messages communicate good news or even neutral information. Often, requests are denied, proposals are rejected, and job applications are turned down. The readers are naturally not pleased, but the documents need to be written. The effective bad news message conveys

STOP AND THINK

1. In addition to routine business messages, where else have you seen messages organized according to the direct strategy, which puts the big idea first?
2. Consider the effectiveness of this organizational strategy for the non-business messages you've noticed. How did you respond?

its information while creating a minimum of resentment. If possible, it should help build goodwill for the company since the reader may be desirable as a customer, client, or future employee.

A good strategy for negative situations is the indirect one. Using this strategy, a writer leads the reader logically to the bad news. Successfully developed, the message minimizes the reader's negative reactions and builds goodwill. A comparison between the direct and the indirect approaches is presented in Table 8–1. Not all indirect messages convey bad news. The persuasive message is a specialized type of indirect message that will be detailed later in the chapter.

Opening

Instead of BIF, big idea first, the writer should use the BILL formula—big idea a little later. The indirect message begins with a buffer, some neutral or positive statement that clearly relates to the purpose that both reader and writer agree on. The beginning might be agreement with the reader, it might express appreciation for the reader's candor in writing, or it might be a compliment.

A good opening begins to let the reader down gently. Ideally, it subtly sets up the explanation that follows in the body of the message. As we saw with the good news strategy, the reader expects things to go his way. When the indirect beginning fails to reinforce that expectation, the stage is set for the denial or bad news to follow.

Body

Next, the message analyzes the circumstances or provides details about the facts that lead to the bad news being conveyed. The challenge here is to be convincing. The tone of this part is cooperative. The writer does not have to say, "Let's look at the facts," but the reader should have that feeling. A study of data breach notifications sent to customers by state and federal agencies found that over 75 percent of the messages followed this indirect strategy—they provided background information before stating the bad news that the readers' personal information had been compromised.⁷

Next, one implies or directly expresses the negative information in as positive a tone as possible. Naturally, a writer should not be so subtle in implying the negative news that the

TABLE 8–1 ■ The Direct Approach Compared to the Indirect Approach

Direct	Indirect
Opening	Opening
Main point	Neutral buffer
Body	Body
Supporting information	Explanation and negative news
Close	Close
Positive statement, action item, goodwill	Goodwill

reader is left hanging. But any direct statement should be tactful and not blunt. The best approach is to subordinate the actual point where the bad news is stated in the middle of a paragraph rather than allow it to appear at the beginning or end.

Close

The next step is important: At the end, strive to rebuild goodwill. Depending on the situation, several options are available. One is to suggest another course of action open to the reader. In response to claims for goods, suggest others that are more durable or appropriate for the reader's use. A letter rejecting a proposal, for example, might give another outlet for the idea.

Close the indirect message on a positive, friendly note. Often, the effort at building goodwill is enough. Sometimes a little more is necessary. A manager might want to offer services or information. For example, a letter written to an old customer might have a catalog enclosed and end by looking forward to the reader's next order.

Handling Negatives

Since an indirect message conveys bad news, it is potentially very negative. To minimize the damage to a company's goodwill, good writers generally avoid negative words. Although the task is a challenge, avoiding negatives pays off in the long run because the practice helps to keep the overall tone positive. The following three rules hold the key:

- Place negative information at points of low emphasis.
- Avoid *no* or *not* when possible.
- Avoid words with negative connotations.

De-emphasize negative facts by placing them in a subordinate structure (a dependent clause, a parenthetical expression, or a modifier) rather than in a main clause or a sentence. In a paragraph, negative information should not be placed in a prominent position. Compare the following two short paragraphs telling a job applicant that the company has no job openings in his area.

We do not anticipate any openings in the Baytown Company anytime soon, since we have been laying off people in your field. You might apply at Rumfield and Company or Bennington, Inc., since they are adding to their staffs.

The writer could easily have softened the negatives by placing them in a less prominent position, as you see below.

Please consider applying for one of the engineering positions now open at Rumfield and Company or at Bennington, Inc. rather than at Baytown Company. Currently Baytown's personnel needs are in other areas.

STOP AND THINK

1. In addition to negative business messages, where else have you seen messages organized according to the indirect strategy or BILL?
2. Consider the effectiveness of this organizational strategy for the non-business messages you've noticed. How did you respond?

The second suggestion for avoiding negative writing (avoiding *no* and *not*) is easier to follow than it seems. Recall the Holiday Inn Express example described earlier in this chapter, which uses positive words to ask guests not to steal items from the rooms. In the revision in the following examples, the writer emphasizes what she *can* do, not what she *cannot* do.

We cannot fill your order until you tell us what size grill your restaurant currently uses.

We can fill your order as soon as you let us have your restaurant's grill size.

Please specify your grill size so that we may fill your order as quickly as possible.

The third suggestion (avoiding words with negative connotations) is one of the most important. Whereas *claim* and *state* might have very similar denotations, their connotations are widely separated. Writing to a person and saying, "You next claim that . . ." makes it sound as if the reader is wrong. Numerous words are likely to irritate or even inflame when they appear in bad news messages. (See examples of such words in the box below.)

allege	argue
failure	mistake
claim	damage
regret	error
careless	broken

SPECIFIC TYPES: DIRECT MESSAGES

The direct and indirect strategies are useful for most writing situations managers face. Nevertheless, because some situations are so frequent (for example, the inquiry) and because some are so sensitive (for example, negative responses to claims), several specialized versions of the direct and indirect patterns have developed. Table 8–2 lists seven specific versions reviewed here.

The patterns suggested here are not absolute. After strategic analysis, a manager may determine that a different approach is appropriate. That kind of adaptation is to be

TABLE 8-2 ■ Types of Direct and Indirect Messages

Direct	Indirect
Inquiries and requests	Negative responses to inquiries and requests
Positive responses to inquiries and requests	Refused claims
Claims	Persuasive messages
Positive responses to claims	

encouraged because it helps to prevent following a mechanical pattern. First, we look at correspondence using the direct pattern; then, we consider correspondence following the indirect. Remember to use a direct approach for good news and neutral, informative messages.

Inquiries and Requests

Perhaps the most common direct correspondence is the inquiry. Managers in all areas of business routinely need information to conduct their affairs. A manager might need to know about the performance of a product; another might want credit information about a client or wish to know about the qualifications of a job applicant. Since most readers see these requests as routine and reasonable, they are likely to respond to them willingly.

If you project yourself into the position of a reader receiving an inquiry, you'll see why the direct approach is so appropriate. You are probably busy with other matters and need to know quickly what is required of you. When you receive an inquiry, you appreciate the reader's efforts to be direct and to let you know from the start what she wants.

Opening

Make the inquiry clear from the start. One effective method is to begin with a question that summarizes the writer's objective. For example, an inquiry about a potential employee could begin with "Would you please comment on Mary Keynes's qualifications to become a management intern? We at Infovend are considering her for the position, and she has given your name as a reference." The question beginning the inquiry makes the purpose immediately clear.

Body

In many cases, the next step in the inquiry is an explanation of the inquiry's purpose. In the example just given, you quickly made it clear that you are considering Keynes for a job. The amount of information a writer gives depends on the situation. In an inquiry about the potential employee, you also probably would want to assure the reader that her response will be kept confidential.⁸ The body of the inquiry needs to be efficiently organized; it cannot simply be a "fishing expedition" for information. Even after the purpose is clear, the reader usually needs guidance to answer the inquiry satisfactorily. Given as much of the sample letter about Mary Keynes as we have so far, it might be answered several ways depending on how the reader projected your needs—or it might not be detailed at all. Thus, the next part of the inquiry should set out the areas requiring information, plus any necessary additional information. Numbering the questions may also help the reader respond.

Close

The close of the inquiry is friendly and builds goodwill. In some cases, it is appropriate to offer similar services. In situations where a purchase might follow, you might ask for a speedy reply.

Let us look at the complete inquiry about Mary Keynes. Note that in this inquiry about a person, you emphasized confidentiality, an advisable practice in this kind of correspondence.

Dear Professor Renton:

Would you please comment on Mary Keynes's qualifications to become a management intern? We at Infovend are considering her for the position, and she has given your name as a reference. Of course, whatever information you give us will be held in confidence.

1. How well does Keynes manage time? Is her work punctual?
2. Did you have a chance to observe her under pressure? If so, does she manage well or does pressure adversely affect her performance?

3. How well does she relate to her peers? Please comment on her relationship with them: Is she a leader or a follower, gregarious or shy, and so on?

I look forward to hearing your comments on Keynes's qualifications and will appreciate whatever insights you can share with us.

Sincerely,
Tim Inman
Human Resources Manager

Positive Responses to Inquiries and Requests

Inquiries naturally need answers. The favorable response to an inquiry is a direct one, as the reader is pleased to get the requested information or item.

Opening

You begin by identifying the request you are responding to. This identification appears in the first sentence of the message. The opening also makes it clear the reader's request is being granted.

- I found Mary Keynes, the subject of your June 5 inquiry, to be one of the most promising students I have ever taught.
- As-Best-As Filing Cabinets have all the features you mentioned in your March 4 letter and several more you might be interested in knowing about.
- Here is my response to your September 14 inquiry about our experiences with the M-102 Security System.

You can begin by directly answering the most general of the questions originally asked (as in the first two examples) or by agreeing to respond to the question originally posed (as in the third example).

Body

The way in which you organize the body of the message varies depending on the original inquiry. For an inquiry that asked one question, the details in response appear in order of importance. If you are responding to a series of questions, normally answer them in the order asked. If the original is really a request (for example, "May we use your facilities for a club meeting?"), the body gives necessary conditions for use.

Not all responses to inquiries are completely good or bad news. Thus, although a manager is willing to answer most questions, some topics are confidential. In these cases, the denial is subordinated and appears after the writer explains why. For example, the response to the inquiry about a company's experiences with the M-102 Security System may withhold some details for security reasons.

Close

The positive response to an inquiry continues to be positive in the close. Note the following closings to the messages whose beginnings we gave earlier.

- If I can help you with any other information about Mary, please contact me.
- If you need any other information on how As-Best-As Filing Cabinets can meet your storage needs, please let me know.
- I'd be delighted to answer any further questions about our experiences with the M-102 Security System. I think you'll be pleased with the system.

Claims

A third type of direct message is the claim. Usually, a dissatisfied customer writes about a problem and requests a solution or claim. Project yourself as manager and consider how you would feel receiving a claim letter. Customer dissatisfaction not only leads to a loss of goodwill and revenue but also reflects badly on your ability as a manager. Naturally, you would want to find out quickly what the problem is and resolve it.

Opening

Even though the claim deals with something negative, it is written directly. From your perspective, directness strengthens the claim. In fact, some readers may interpret indirectness as lack of confidence in the claim being made. Indirectness would thus be a strategic error.

Early in the claim, you should include details about the faulty product, service, or sale. Which details to incorporate depend on the situation, but they may include invoice numbers, dates, and the product identification or serial number.

Another good tactic that makes the message convincing is to include the significance of the problem to you or your business. For example, a warehouse manager whose new intercom system failed might write,

The new intercom system you sent us (Invoice #16789) has broken, thus considerably slowing the processing of orders in our company warehouse.

Body

The next step is logical: The facts of the case need detailing. In the intercom example, you discuss how the system broke down and the possible cause. Naturally, you do not need to be an expert analyst, but the more facts you include, the more convincing your argument. If appropriate, you may also wish to detail the damage that resulted.

Of course, detailing the problem requires tact and forbearance. You feel justified in writing about the problem, but you do not attack the person who sold or installed the product or its manufacturer. Name-calling or accusations do little if any good and may create reader resentment, which usually precludes a favorable settlement. Abusive messages are best left unsent.

The next part of the letter states what you want: What will set things right? Unfortunately, some letters end before this point. An unhappy writer complains and then forgets to say what he wants. Specifying the action or amount of money needed for satisfaction is usually preferable. Occasionally, the settlement can be left up to the reader if the situation is routine.

You may also wish to include a deadline for action on the matter. Naturally, a deadline needs something to back it up. If you make a threat or ultimatum, be sure that you are willing and able to carry it out if the situation is not resolved. Weigh threats carefully. They can be counterproductive.

Close

Once again, avoid negativity in the close. If you threaten to take your business elsewhere, the reader may lose any motivation for cooperation. End by expressing confidence in the good faith of the reader or by expressing intended gratitude for the early resolution of the problem.

Let us look at the rest of the claim about the faulty intercom and see how it illustrates these points.

Dear Mr. Packard:

The new intercom system you sent us (Invoice #16789) has broken, thus considerably slowing the processing of orders in our company warehouse.

Although the system worked fine immediately after installation, we began to notice problems with it during stormy weather. When it rained, static garbled many of the messages. Finally,

during one heavy downpour, the main transmitter stopped working and began smoking.

We are shipping the transmitter to you via Brown Express. We would like it either repaired or replaced. Your prompt attention will help our warehouse to return to normal.

Sincerely,
Patricia Muranka
Purchasing Manager

In this message, the manager detailed the problem her department faced, yet she resisted accusatory language. She set out her experience with the system and provided enough information for the manufacturer to diagnose the problem. The ending is positive yet assertive.

Positive Responses to Claims

The fourth type of direct message is the positive response to a claim. While the use of the direct order is unquestionable, this type still challenges the writer who is aware

of the unpleasantness the reader experienced. The reader may have lost sales or may have been uncomfortable or inconvenienced. The challenge here is to rebuild goodwill and, in many cases, restore faith in the product. The reader who does not believe in the product will buy elsewhere next time. Occasionally, especially when dealing with angry customers, you respond to a very unpleasant or accusatory letter. You must not rise to the bait.

Opening

Begin the adjustment grant with the good news. The reader needs a reminder to recall the situation, but this reminding should be done quickly. Thus, the letter responding to the claim about the faulty intercom might begin in the following manner:

Your transmitter is now in working order and should arrive in Cedar Rapids by truck in the next few days.

Body

After the good news, the development of the body depends on the situation. Routine cases need little explanation. In many cases, however, the reader needs more. It is usually necessary to explain what went wrong, and it is often a good idea to stress that the problem is corrected and will not recur.

Occasionally, you will need to explain the proper use of the product to a reader who unintentionally misused the product. In such cases, the reader's goodwill is worth the cost. This explanation needs to be tactful and is most effective when presented impersonally, as in the second example that follows:

- You left the valves open on the unit. As a result, your heater was on constantly and wore out.
- The valves leading out to the unit must be kept tightly closed to reduce the demand on the heating unit.

In the explanatory material and the close, keep the tone positive. Common courtesy seems to dictate an apology, but it often serves to open old wounds. Instead, look to the future with a confident, positive approach:

You can expect many more years of trouble-free service from your transmitter.

Close

The closing of an adjustment grant is positive. It anticipates continued good relations with the customer and may include information on other products or services the company offers. You build goodwill by discussing the advantages of the product. You also refrain from stating the fault was the electrician's rather than the manufacturer's, although you have taken steps to protect the equipment in the future.

Dear Ms. Muranka:

Your transmitter is now in working order and should arrive in Cedar Rapids by truck in the next few days. Please call your electrician when it arrives, so his installation will protect the warranty.

You reported that the system had static in it during rainstorms and that it smoked when the system stopped working. I've checked the new patented fusible ground lead and found that it had melted, as it was designed to do, and protected the transmitter and you from electrical shock.

When your electrician installs the transmitter, have him check the unit's grounding. At present, when it rains, the unit is shorting out because of incomplete grounding.

You might be interested in our new security alarm system that hooks into the existing intercom system. The enclosed pamphlet gives you the details. We will be glad to discuss its installation with you.

Sincerely,
Robert Packard
Customer Service Manager

SPECIFIC TYPES: INDIRECT MESSAGES

Most managers cannot comply with all the requests made of them. In those situations, the response is best organized according to the indirect plan.

Negative Responses to Inquiries

The strategy for constructing negative responses to inquiries requires thought and planning. When requests need denying, use a bad news strategy. Reasons appear first, followed by the refusal.

Opening

The opening should remind the reader of the request. This initial statement should also serve as a buffer that does not imply either a positive or negative answer. Furthermore, the opening should lead logically into the body.

Suppose, for example, you received a letter from a researcher inquiring into the population sample used to determine your company's marketing strategies. Since such questions deal with proprietary information that the company keeps confidential, you must deny the request. At the same time, you do not want to refuse directly. Your request might begin with one of the following buffers:

- Thank you for your inquiry about our marketing research and strategies.
- The results of your study of population samples should prove interesting.

This introduction gives no false hope for a positive reply, but it does not deny the request yet. However, it lays the basis for that rejection. The rest of the letter develops the approach.

Body

From this beginning, you move into a discussion of why the request cannot be granted. You consider the reader and choose examples or reasoning likely to convince the reader that yours is the only viable solution. For example, in the preceding letter, you could appeal to the reader's own experience as a researcher who has spent hours developing ideas. Similarly, after great expense, your company developed ideas that it applies to its own needs.

Once you have given the reasoning, you can state the refusal. Occasionally, writers refuse requests so vaguely that the reader still sees hope for the request. The well-written refusal reasons the reader out of the original request. However, the reasoning does not suggest the original request was ill advised or misdirected.

Close

Close positively to build goodwill. The close can look to the future, such as a wish for success in the reader's work or a suggestion for some other sources of information the reader could use.

In the letter refusing the request for information on marketing strategies, note how you imply the refusal rather than state it. Note also that you make no apology for refusing.

Dear Ms. Leeper:

The results of your study of population samples should prove interesting, as most companies protect these data because they are so central to their marketing strategies.

At Flo-Sheen Fabrics, we develop our marketing strategies only after our test market has had a chance to examine our new fabrics. As a researcher, you can surely appreciate the countless hours that go into any marketing campaign.

We keep the population sample used for our marketing analysis confidential both to

protect their privacy and to help us keep our competitive edge. Our competition would have an unfair advantage over us if they were able to know in advance what products we planned to introduce or what strategies we would use.

You might look into any text on statistical sampling to learn the considerations managers must take in selecting population samples.

Sincerely,
Sheila Hebert
Vice President

Refused Claims

A greater challenge than the negative response to an inquiry is the refused claim. In most cases, the person making the claim believes she is justified; her interests have been damaged by what she sees as bad products or services. However, for whatever reason, you have determined that you must reject the claim.

In doing so, you must maintain a positive tone and build goodwill. The key is empathy. Imagine how you would want to be treated in this situation—probably reasonably. To respond in an authoritarian or a condescending fashion would be foolish. The language must be positive and selective. Most likely, the reader will be sensitive to any possible nuances.

Opening

The claim refusal must begin as most negative messages would: with a buffer. This buffer can refer to the reader's original claim as its subject, or it can be an expression of appreciation—some opening that brings the reader and writer together neutrally.

The effective opening also indicates the line of reasoning to be followed. Take, for example, the opening sentence, “Whitlow Co. does guarantee its sump pumps for eighteen months in normal operation under normal circumstances.” The reader is reminded of the original claim and is introduced to the line of reasoning in “normal operation” and “normal circumstances.” Another opening might be the following:

Your recent letter shows that you are a person who appreciates being treated fairly and openly. You will be interested in what we have found in our investigation into your questions.

Body

The body details your findings. This explanation should be objective and convincing, but it should avoid a my-side, your-side dichotomy. One effective tactic in some situations is to describe the effort that went into investigating the matter. For example, a negative response to a warranty claim may emphasize the laboratory tests made on the broken part. This detail is useful because it projects a caring image; the decision made is not just some automatic response.

Give the refusal once the reasons are clear. Of course, the refusal should appear at a point of low emphasis. If the refusal is based on company policy, the policy should be clearly explained. But remember that customers generally resent managers “hiding behind” company policy. Use logic whenever possible instead.

Close

Most claim refusals close with an effort at resale. If the customer has been treated fairly in a reasonable manner, she may stay with the product since the company was not at fault. Frequently, it is a good idea to move away from the immediate topic by mentioning an upcoming sale or by sending a recent catalog.

Dear Ms. Clark:

Whitlow Co. does guarantee its sump pumps for eighteen months in normal operation under normal circumstances. After your recent letter, we looked closely into the questions you raised.

Our laboratory examined the returned pump and found that the entire unit had been submerged for some time. This submersion was in keeping with the newspaper accounts of heavy flooding in your town last month. Apparently the area where your unit was located was also inundated. While the pump is designed to take care of normal seepage,

it is mounted at least 18 inches above the basement floor to protect the housing and pump. Like most motor-driven appliances, the pump must be kept totally dry, as it is in normal circumstances.

You might be interested in another model pump we offer, the SubMerso. Its waterproof housing withstands even prolonged immersion. The enclosed pamphlet details its capacities. We'll be glad to answer any questions you might have on it.

Sincerely,
Lionel Naquin
Customer Service Representative

Apologies

When composing a bad news message, such as a negative response to an inquiry or a refusal to a claim, you may be tempted to include an apology. This decision is controversial. Corporate attorneys have traditionally warned against apologizing because it implies responsibility for wrongdoing and even guilt, inviting legal action against the writer and her organization. Public relations professionals agree that apologies can be interpreted as an admission of error or carelessness, damaging a company's image.⁹

Recently, however, the trend has been changing because of evidence that an apology can help rather than hurt, in terms of both image and legal judgments. In the field of medicine, malpractice-reform advocates say an apology can help doctors avoid being sued and can reduce settlements. This approach seems to be working. For example, since 2002, the hospitals in the University of Michigan Health System have been encouraging doctors to apologize for mistakes. The system's annual attorney fees dropped by two-thirds, and malpractice lawsuits fell by half.¹⁰ As of 2014, thirty-six states have enacted apology laws; they are designed to protect health care providers who want to talk to patients and families when an adverse outcome occurs without fearing litigation.

The United States has witnessed a remarkable rise in the number of public corporate apologies. During the 2000 “summer of apologies,” company executives begged pardon for unreliable flights, bad phone service, and tire blowouts. Since then, the pattern has continued. In January 2014, after a massive data breach that affected up to 100 million shoppers, the CEO of Target quickly issued a public apology. “Our top priority is taking care of you and helping you feel confident about shopping at Target. . . . We didn't live up to that responsibility, and I am truly sorry.”¹¹ In April 2017, United Airlines was widely criticized for forcibly removing a customer from a flight when he refused to give up his seat for a crew member. CEO Oscar Munoz issued numerous profuse apologies. An open letter published in the *Houston Chronicle* on April 27, 2017, began, “We can never say we are sorry enough for the shameful way one of our customers was treated aboard United's flight 3411.” A similar letter was published in United's inflight magazine, *Hemispheres*, the following month: “We broke that trust . . . we can never say we are sorry enough for what occurred.”¹² If a manager makes the strategic decision to apologize, either individually or on behalf of the organization, what are some guidelines? A good apology is genuine and timely. It should consist of four parts:

- An acknowledgment of the mistake or wrongdoing
- The acceptance of responsibility
- An expression of regret
- A promise that the offense will not be repeated¹³

Perhaps the most critical issue is acceptance of responsibility or fault. A partial apology, where the manager expresses sympathy or regret without admitting guilt, softens the blow and may be wise when there is significant damage or injury. Partial apologies can also resolve disputes when the extent of fault is unclear or difficult to establish. In other circumstances, when a manager or company has clearly committed an egregious act, a more complete apology may be appropriate.

STOP AND THINK

Think of a time when you were wronged.

1. How important was it for the perpetrator to apologize to you?
2. If you did not receive an apology, what did you do?
3. Would you have taken different steps if you had received an apology?
4. Why is it difficult to apologize?

In either situation, the focus should be on the future and on making amends.¹⁴ In the Target identity theft case described above, the retailer offered all of its customers—whether or not they were directly affected—a year of free credit monitoring to compensate for their risk of data breach. In the United Airlines case, two weeks after the incident, the company announced sweeping policy changes including increased compensation for voluntarily giving up seats (up to \$10,000), reduced overbooking on certain flights, improved automatic check-in processes, and increased training for employees. These changes were designed to restore credibility and brand reputation, according to Rob Britton, professor of marketing at Georgetown University’s McDonough School of Business.¹⁵

Persuasive Messages

The indirect strategy is appropriate for persuasive messages. A manager uses the indirect persuasive strategy when trying to persuade others to do things they might not ordinarily wish to do. You might need to write a persuasive letter to convince a reluctant client to pay his bill. Or you might write a persuasive e-mail to gain a colleague’s support on a project. Or you might compose a sales letter to potential customers.

Opening

The persuasive message opens by catching the reader’s attention. One effective way of doing this is to show the reader that her goals are your goals. The best way to show this identity of goals is to show her that the message deals with matters she is interested in. At the same time, since the message must catch the reader’s interest, the opening must be brief. Thus, a sales letter for a tropical resort hotel might begin, “Are you tired? Do you deserve a vacation?”

Body

The body consists of several parts. First, it must convince the reader that you understand their problem. Then, it must reveal the solution to the problem—the solution that you want the reader to embrace. This section reflects careful strategy, since the reader’s possible objections must be anticipated and answered. In this section (which can consist of several paragraphs), you must stress the benefit accruing to the reader as a result of the solution. In the case of a resort hotel’s sales letter, therefore, the body might consist of a list of features and benefits in vivid detail.

Close

The ending is important. The effective persuasive message does not end after the proposed answer is revealed. At the end, after the reader’s interest has been aroused, the

interest must be channeled into action. Otherwise, interest will decline, with nothing resolved. The action item should be specific: a meeting, an order, a payment, an interview, a change in procedure. An action must be prompt. Delay only lessens the probability of action.¹⁶ The resort hotel's sales letter might, therefore, end with an enticing discount offer "for a limited time only."

The following job application letter illustrates the implementation of the indirect persuasive strategy.

Dear Mr. Harris:

Now that Lynch's is about to open its third department store in Jonesboro, won't you need a sufficient staff of part-time employees to supplement your full-time workers? I have the background and motivation necessary to become one of your most productive part-time workers.

As a junior marketing major at State University, I am currently taking marketing courses. I could apply what I learn over the next two years to my sales work at Lynch's. The job references listed on the attached résumé will all attest to the fact that I am very energetic and enthusiastic about my work.

Another reason I would make a good part-time employee for you is that I am very interested in pursuing a career with Lynch's after graduation. I would see these two years as a testing period to prove myself, and you would have the two years to decide whether or not you would be equally interested in me.

If I have described the kind of part-time salesperson you want at Lynch's, may I have an interview to further discuss the position? I can be reached at 555-8403, and I can be available at a time convenient to you.

Sincerely,
John Morris

LETTER FORMATS

Thus far, we have discussed two strategies for organizing routine messages—direct and indirect—and showed how to use them when sending messages to external audiences, such as customers, clients, regulatory agencies, and other stakeholders. Typically, these messages are in letter or e-mail format. Good writers know that the appearance of a document can affect the reader's reaction to its content, much the same way a speaker's appearance affects the listeners' response to her message. A word about contemporary letter format is therefore appropriate.

Many routine business messages are sent electronically, either as e-mails or as e-mail attachments. Formatting elements, such as tabs (indents) and centering, can change or even disappear according to the technology used to open the message. So the appearance of a message should be simple, plain, and as easy to read as possible. A standard contemporary style is to begin every part of a business letter at the left margin (flush left, ragged right).

Reliance on the concept of white space makes sense, too. Standard business letter style calls for single spacing within paragraphs, with double spacing between paragraphs and between elements of the letter. This line spacing format eliminates the need to indent when you begin a paragraph. Keeping paragraphs short, as discussed in Chapter 7, also builds white space. The persuasive letter in Figure 8-1 exemplifies excellent strategies for both content and format.

FIGURE 8-1 ■ Sample Persuasive Letter**LaSalle Senior Center**

1111 N. Wells St., Suite 500, Chicago, IL 60610
312-573-8840 Fax 312-787-1212

Gerry Hynes
3780 Copperfield Dr., Unit 1018
Bryan, TX 77802

Dear Gerry,

As the year moves to an end, I think about two of our seniors who died this year. They were each exceptional in their own way; each had a key role at the LaSalle Senior Center and each benefited from the services we offered just as we benefited from their gifts. They were like many of the seniors we work with, both a client and a volunteer.

Marc Stuart was a regular volunteer at both the Wednesday and Sunday meals. Having management experience, he was inclined to supervise both clients and volunteers. He was part of the fabric of the Senior Center and showed his support by his presence and by his care for other seniors. The Senior Center provided Marc with a place to serve and live out his faith. He told me on several occasions that his first priority was LaSalle Street Church followed by the Senior Center.

Allene Hales was exceptional by any standard. With little formal education, very modest means, and compromised health, she brought people together at the Senior Center and in her community. She knew everyone. And she was always helping others, offering a kind word, sharing money or food. The Senior Center recognized her for her gifts and provided her some real help with day-to-day matters.

Marc and Allene found a home at the Senior Center. They found a place that offered them help, a place where they could serve and a place to belong. Thanks to your support, the LaSalle Senior Center continues to be that place for over 200 local seniors every month.

Please consider making a gift* to help continue our ministry to our neighborhood's older friends.

Sincerely,

Keith Chase-Ziolek

Director

*A generous donor will match the first \$5,000 in gifts.

Source: Chase-Ziolek. Reprinted by permission of the author.

Regarding typography, a detailed discussion of the impact of type style in business documents is found in Chapter 6. Briefly, the selection of a font style depends on whether the message will be read on paper or on a monitor (see Table 8–3). For hard copy documents, **Times New Roman**, 12 points, is a classic, traditional standard in business. TNR, released in 1932, has a professional, formal look. It is a *serif* font, with projections at the edges of the letters that make the type easier to read, especially in the smaller sizes. Other popular serif fonts are **Garamond** and **Cambria**. In addition to business letters, paper documents such as newsletters, brochures, and manuals should use a serif font.

For electronic messages, **Calibri**, 11 points, is standard. Calibri is a contemporary *sans serif* font; sans serif fonts do not have projections on the edges of the letters. Sans serif fonts are easier to read onscreen and are often used for websites, posted announcements, and signs. Headlines and headings, which are usually in larger type size than the accompanying text, also may be in a sans serif font. PowerPoint slides, as you discovered in Chapter 5, typically are in **Arial** font, one of the most popular sans serif fonts. Other sans serif fonts popular for business writing are **Verdana** and **Helvetica**.

If you are thinking that typeface is a trivial matter, consider the case of IKEA, the Swedish retail giant. In 2010, the company’s home furnishings catalog switched from a customized version of **Futura** to **Verdana**, a style invented by Microsoft and intended to be used for messages read on screens rather than on paper. This change touched off an uproar across the world. Design specialists as well as customers complained that the new font was plain and ugly, especially when enlarged to the size of a catalog headline or a billboard. IKEA defended the change by pointing out that Verdana is used in all countries and with many alphabets. “It’s more efficient and cost-effective,” said IKEA spokeswoman Monika Gocic. “Plus, it’s a simple, modern-looking typeface.”¹⁷

TABLE 8–3 ■ Font Styles for Business Messages

Font	Category	Uses
Times New Roman	Serif	Hard copy reports, business letters, and other documents
Garamond	Serif	Hard copy reports, business letters, and other documents
Cambria	Serif	Hard copy reports, business letters, and other documents
Calibri	Sans serif	Soft copy reports, e-mail, websites, posted announcements, headings, and signs
Arial	Sans serif	PowerPoint, e-mail, websites, posted announcements, headings, and signs
Verdana	Sans serif	E-mail, websites, posted announcements, headings, and signs
Helvetica	Sans serif	E-mail, websites, posted announcements, headings, and signs

INTERNAL CORRESPONDENCE

The writing strategies described in this chapter apply to internal as well as external correspondence. Letters are the most frequently used written format for communicating with external audiences, such as customers, regulatory agencies, suppliers, and other firms; memos and e-mail are the format most frequently used for written messages within an organization.¹⁸ The memo is an efficient, straightforward kind of communication. Often, memos are sent electronically, as e-mails. E-mail is becoming more commonly used for routine external communication as well. A hybrid format is a business letter or memo sent as an e-mail attachment, a practice that allows the sender to stabilize design and format elements when the document is opened.

As in the case of external correspondence, the writer needs to adapt strategically when composing internal correspondence. This is especially true when writing to employees at a different level within the organization, or who possess a less specialized knowledge of the subject, or when the memo deals with sensitive matters. While internal messages are often routine, informal exchanges of information, they should be composed carefully. After all, they are official, permanent records that might be accessed and read by multiple audiences, including external audiences, despite the writer's intentions.¹⁹

Memo Format

Memo formats differ from one another in minor details, but they generally have four standard guide words at the top: *To*, *From*, *Subject*, and *Date*. In e-mails, these guide words are automatically provided. The *From* line offers few problems. However, if needed, a writer can add to her authority by including her job title after her name. She can add the names of others here as well—assuming she has their agreement.

The *Subject* line has obvious value in directing the reader's attention. Be specific about your topic and purpose. For instance, "Subject: Request for Vacation Schedules" is more likely to stimulate reader response than the vaguer "Subject: Schedules." Using key words in the *Subject* line will often aid in the memo's later retrieval from archives and files as well.

Just as with face-to-face interactions, memos sent within an organization typically have a set protocol one should respect. This means paying attention to the format generally used as well as noting any subtleties related to whom the memo or its copies (C:) are sent.²⁰ Often, by noting at the C: line that the memo is being sent to a boss, one is also sending the message of one's easy access to that boss. Similarly, be sure to copy your immediate supervisor when contacting the supervisor's bosses. In general, copying your supervisor keeps him or her aware of what is going on. Even in cases where that individual is not immediately involved, the supervisor will appreciate knowing about events. However, the proliferation of e-mail "copies" and Reply to All in most organizations is a caution not to flood people with excessive messages that are merely for your information or FYI.

Another format element to note is the need for either your initials or signed name on the *From* line of the paper memo. This authenticates the document just as a signature does on a letter. However, adding your name at the end of a memo or e-mail is redundant if it appears on the *From* line. Pithy quotations, illustrations, and similar "signature"

elements at the bottom of e-mails add clutter and can be annoying distractions to business readers. Remember that short, simple messages have the most impact.

Finally, remember that design elements such as tabs and bullets may not be preserved in e-mails at the receiving end. If your e-mail needs a simple bulleted list, create it using characters on your keyboard, such as the dash symbol. If more complex formatting like tables or multi-level lists are needed, create a separate document and send it as an attachment to your e-mail.

E-mail Format

Beyond the standard guide words at the top, e-mail format varies from organization to organization and often from writer to writer. You have probably noticed differences in the following categories:

- Forms of address—greetings and sign-offs
- Linguistic novelties—emoticons, jargon, and acronyms
- Punctuation and capitalization
- Spelling—conventional or “text shorthand”
- Endings—thought of the day, slogans, images

Rules have emerged for e-mail style or *netiquette*, but they are often ignored. For instance, some writers begin an e-mail with a salutation or Dear line, despite the To line at the top. *Dear* was born about a thousand years ago, meaning “honorable, worthy,” and took on the sense of “esteemed, valued” and “beloved.” In the age of the quill pen, according to William Safire, *Dear* was used as a polite form of address for anyone—friends, business acquaintances, or strangers. Today’s e-mails are as likely to begin with Good afternoon, Hello! or Hi as with Dear. Occasionally, managers address multiple audiences as All or even Folks.

Judith Martin, author of *Miss Manners’ Guide to Excruciatingly Correct Behavior, Freshly Updated*, suggests that you may begin an e-mail “with almost anything civil. Or even nothing, because an e-mail is like a memo and doesn’t require a salutation. . . . But that is presuming informality is understood not to be a euphemism for rudeness or sloppiness.”²¹

Just as conventions for e-mail greetings vary from organization to organization, so do conventions for e-mail signoffs. While business letters typically end with “Sincerely,” that closing may seem too formal for routine e-mail messages. Instead you may see “Thank you,” “Regards,” “Cheers,” or “Warm regards.” Currently the most popular closing is “Best,” which is a streamlined version of “Best wishes,” a phrase that goes back centuries.²² All of these are safe and more succinct than “Have a good day” or “Make it a great day.” The popularity of texting as a business communication tool has resulted in internal e-mails becoming more informal, to the extent that a closing is often omitted. Good advice for e-mail writers, then, is to be courteous as well as concise. Overly formal formatting is as inappropriate as overly casual formatting.

Memo and E-mail Uses

Memos and e-mails serve a variety of uses within an organization. We have listed the most common below. You may see other practices where you work as well.

Communicating to Groups

Managers find memos and e-mail useful for communicating the same information to several individuals at once. Not only does the memo or e-mail save time over talking, but it ensures as well that each person has the same information.

Fixing Responsibility

The memo or e-mail can be a valuable management tool in other ways. For example, it can fix responsibility for actions. A manager who uses memos for giving assignments has a written record if questions of responsibility arise later.

Communicating With Opponents

Managers quickly learn to appreciate the memo and e-mail as a way of communicating with those they cannot get along with. Personal dislikes crop up in any organization from time to time, but memos and e-mails bridge the gaps that may ensue. Recently texting and Twitter have been added to the list of communication channels traditionally used for this purpose. The message gets delivered without bringing the two factions together. However, it is never appropriate to “flame” a reader with an emotion-packed e-mail, text message, or Tweet. Remember the permanency of all messages generated at work, whether paper or electronic. Never write something you could not defend in a meeting or courtroom.

Communicating With the Inaccessible

Memos and e-mails are handy for dealing with people (especially supervisors) who are hard to reach. Those who are busy or absent can be reached by memo or e-mail or, increasingly, by text message. A series of memos can also be proof of past attempts to contact a boss if problems arise. An example of a clear, concise, informative memo follows.

Types of Internal Correspondence

Memos and e-mails tend to fall into two groups: announcements and requests. Both these general types can be directed to large groups within an organization (especially announcements), and both can be directed to individuals.

Announcements

Announcements concern policy changes, meetings and conferences, new products, and personnel changes (including promotions). By nature, they are informative, nonsensitive messages and follow the direct order strategy. Other types of notifications include status reports, such as progress and periodic reports. The following informative memo is an example of an announcement.

MEMORANDUM

TO: All Salaried Employees
FROM: Alan Reynolds, Director of Human Resources
DATE: October 3, 2018
SUBJECT: Changes in Payroll Practices

We've made a couple of changes in the payroll procedures to alleviate some of the bottlenecks that have delayed paychecks in the past few months.

1. Paychecks will no longer be mailed out. You will receive your check for the month on the last working day of that month.

Direct deposits will still be made to your checking or savings account provided you use direct deposit for only one account.

2. All travel and expense reimbursements received before the twentieth of each month will be included in that monthly paycheck. Requests for reimbursement will no longer be paid by individual checks as in the past. Of course, these expense reimbursements are not taxed.

These changes in payroll should help to guarantee timely paychecks.

Requests for Action

The nature of the request-for-action memo dictates its organization. When a manager requests action that typically falls under her jurisdiction, direct order is appropriate and the memo or e-mail begins with a clear Subject line that includes the writer's purpose and topic (for example, "Subject: Request for vacation schedules"). When the requested action may meet with resistance, a less specific Subject line and a more persuasive strategy (indirect order) are appropriate (for example, "Subject: Upcoming procedure changes"). Direct or indirect, these memos and e-mails often require listing steps and careful wording for successful action. Remember, concrete language is always preferable to vague expressions, such as "please give your attention to this matter" and "reply at your earliest convenience," when requesting behavior change (see Chapter 7).

Political Uses in Business

Recall from the previous chapter that managers belong to a discourse community with unique characteristics and uses for their writing. The memo and e-mail are examples of strategic tools for managers. In fulfilling their ostensible task of communicating announcements and requests for action within an organization, they are often put to other strategic uses. The uses are detailed next.

One political device is the copy list. Managers can protect themselves, publicize alliances, and show favor by including—and not including—certain people as cc: recipients.

Another practice that is widely used is to write a memo or e-mail summarizing a meeting. While the message is ostensibly "for the record," its recording of the meeting or

conversation can affect perceptions. The meeting minutes become the reality and may, for example, prove ownership of an idea.

Still another political tactic is to attach a cover memo to that of a colleague. If the original memo reflects poorly on the writer, the practice serves to offer another viewpoint.

Managers sometimes use memos to shape employees' opinions. An announcement of a policy or procedure change that uses positive language and stresses reader benefits may influence readers' willingness to comply with the new system. In summary, managers should remember that anything they put in writing, whether on paper or in digital format, is permanent. Think twice about how you commit yourself to paper or e-mail in controversial situations. "Routine" documents can have an important impact on a manager's effectiveness and image.

SUMMARY

Letters, e-mails, and memos can benefit greatly from strategic considerations. However, they are frequently mere impersonal messages written automatically. One key consideration for audience adaptation in routine messages is the you attitude. The writer with this attitude projects himself into the reader's position and prepares messages to suit that reader.

The you attitude also influences the organization of ideas: Direct order is appropriate for good news and neutral information; indirect is for bad news messages and persuasive messages. Direct order places the main point first; indirect, later.

Common types of direct messages are the inquiry, the positive response to an inquiry, the claim, and the positive response to a claim.

Indirect messages are the negative response to an inquiry, the refused claim, and the persuasive message.

Negatives must be handled carefully in correspondence. A writer should de-emphasize the negative by using subordination, by avoiding terms such as *no* and *not*, and by avoiding negative wording or words with negative connotations. Apologies are a strategy that can improve a manager's and organization's image. They can also create the impression of guilt and liability.

Memos and their electronic equivalent, e-mails, are the most frequently used internal written communication. E-mails and memos are efficient, straightforward messages that require some strategic considerations in their writing. They have several uses for a manager, including communicating to groups, fixing responsibility, communicating with opponents, and communicating with the inaccessible. They fall into two categories: announcements and requests for action.

Memos and e-mails are frequently used in office politics.

CASES FOR SMALL-GROUP DISCUSSION

CASE 8-1

Claim Refusal Letter

You are the sales manager for a furniture manufacturer and have just received a strongly worded claim letter from Hiram Blalock, who owns a large hotel in a nearby city. Blalock has been refurbishing his hotel and had placed a special order with you for 115 headboards to fit specifications he sent.

He ordered headboards an inch and a half narrower than for conventional king-size beds. He also specified a finish different from that normally used in this grade of headboard. Finally, he wanted his hotel's logo imprinted on each headboard. You completed this order and shipped it to him about a week ago.

He ordered the mattresses directly from a manufacturer that has since gone out of business. They did, however, deliver his mattresses before going bankrupt, just a week before your headboards arrived. The problem is that all these mattresses were manufactured in the conventional dimensions rather than the narrower ones for which the headboards were designed.

Blalock is asking you to take back the current shipment and either change the dimensions to fit the conventional mattresses or send a different set (which would, of course, have the finish he specified and his hotel's logo on them).

Obviously, you cannot comply with his request. Write an appropriate strategic claim refusal. The facts are on your side—he ordered the headboards in the size and finish that he received. However, the challenge is to tell him so without lecturing or using negatives. If you do choose to alter the headboards in the original order, feel free to do so—but be sure to charge him. Most importantly, you want to keep Blalock as a customer.

Case Note

This case tempts the writer to respond to Blalock with the same kind of letter he sent. Those using the appropriate indirect negative response will avoid lecturing to the reader as they remind him of his role in the problem. The suggested option (remodeling the headboards) is one strategy, but it should not be presented as if the writer feels guilty. If the letter suggests guilt, then the writer can expect more problems.

CASE 8-2

Inquiry Letter

You are the assistant human resource manager for an insurance company whose territory includes your state and three surrounding states. Your company has recently revamped its retirement and employment benefits packages, and you have been assigned the task of communicating these changes to all employees.

Since some of the changes are complex, you will be traveling to four sites in your region to meet with the company's agents and their personnel. You need to arrange hotel accommodations for the personnel at each of the sites, and you will need a meeting room with a screen and equipment for projecting your PowerPoint slide show. Since the company has had a very good year, management wants the employees to enjoy their stay at the hotels. So you also need to inquire into the recreational and banquet facilities available.

Write a letter of inquiry to the Hotel Beacon in a major city in one of your surrounding states. The letter should elicit the information you will need to decide if the hotel is the right one for your meeting. Make it clear that you will be looking at other hotels, seeking the best rate for services required.

Case Note

The most common pitfall in this case will be the lack of clarity. The letter is actually more complex than it seems. The temptation for some will be to write a brief letter, which the hotel marketing manager will be unable to answer in proper detail. In addition to being thorough, the letter should also build goodwill; the writer may be interested in doing more business in the future with the reader.

CASE 8-3*Request Refusal Letter*

You are the administrative assistant to R. D. Spenser, president of Flo-Sheen Fabrics. Flo-Sheen employs over three hundred people in its mill and corporate offices. Each year, these employees contribute generously to the city's annual fundraising drive. Spenser also has developed a volunteer program that allows some employees to work on charitable projects on company time.

On your desk today, you found a letter that was sent to Spenser from a statewide youth organization requesting permission to conduct a fundraising drive in your plant for a new project it is developing. The organization wants to establish a scholarship fund for its brightest members.

Spenser jotted a note at the bottom of the letter asking you to deny the request. Do so, but build up goodwill. Be positive yet assertive; do not leave the organization wondering if the request is denied.

Case Note

Since the letter must build goodwill, the writer must use tact in denying the request. One option would be holding out the possibility of putting the youth organization on next year's list. But do not leave the reader feeling that another letter might get the results that the first one missed. The letter also needs to explain why the president of the company is not responding.

EXERCISE FOR SMALL GROUPS**EXERCISE 8-1**

As you prepare to revise the following memo, consider purpose, audience, organization, and tone. Change the headings to standard format. Consider using design elements such as bullets, headings, or a word table to clarify the information in the memo's body.

INTEROFFICE CORRESPONDENCE

To: Purchasing
Date: January 21
Subject: Schedules

From:

St. Louis, Missouri

Well we had our team meetin just like usual this week. We talked about alot, but I thought I should remind you of a few things that are pressing. Don't forget that we are supposed to send our schedules for the week to Buffi. These should be transmitted by EMail each Monday or Friday if you can get it done early. It'r really helpful to know where you are when we can't find you.

Your vacation schedules should be estimated by now so please give them to me by the end of next week.

cc:

Student Study Site

Visit the Student Study Site at study.sagepub.com/hynes7e for web quizzes, video links, web resources, and case studies.

Notes

1. A review of research on the importance of written and oral communication for managerial success and for promotion can be found in N. Lamar Reinsch and Jonathan A. Gardner, "Do Communication Abilities Affect Promotion Decisions? Some Data from the C-Suite," *Journal of Business and Technical Communication* 28, no. 1 (2014): 31–57.
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