

# A Planning Checklist for Business Messages

by Sophia



## WHAT'S COVERED

In this lesson, you will learn about the importance of purpose in writing, as well as the necessary components of business messages. Specifically, this lesson will cover:

## 1. Determining Your Purpose

Preparation for the writing process involves purpose, research and investigation, reading and analyzing, and adaptation. First, you must consider how to determine the purpose of a document, and how that awareness guides the writer to an effective product. While you may be free to create documents that represent yourself or your organization, your employer will often have direct input into their purpose.

All acts of communication have general and specific purposes, and the degree to which you can identify these purposes will influence how effective your writing is.



### Self and Social Awareness: Skill Tip

Using your self and social awareness skill to understand your audience can help you craft a message that will be welcome, trusted, and understood.

General purposes involve the overall goal of the communication interaction: to inform, persuade, entertain, facilitate interaction, or motivate a reader.

The general purpose influences the presentation and expectation for feedback. In an informative message - the most common type of writing in business - you will need to cover several predictable elements:

- Who
- What
- When
- Where
- How

- Why (optional)

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

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

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

### IN CONTEXT

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

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

Now imagine that instead of being a housing authority employee, you are a city resident who receives that informative letter, and you happen to operate a business as a certified radon mitigation contractor. You may decide to build on this information and develop a persuasive message. You may draft a letter to the homeowners and landlords in the neighborhood near the building in question.

To make your message persuasive, you may focus on the perception that radiation is inherently dangerous and that no amount of radon has been declared safe. You may cite external authorities that indicate radon is a contributing factor to several health ailments, and even appeal to emotions with phrases like "protect your children" and "peace of mind." Your letter will probably encourage readers to check with the state radon office to verify that you are a certified contractor, describe the services you provide, and indicate that friendly payment terms can be arranged.

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## 2. Credibility, Timing, and Audience

**Credibility**, or the perception of integrity of the message based on an association with the source, is central to any communication act. If the audience perceives your message as having presented the information in an impartial and objective way, perceives your source's expertise in the field as relevant to the topic, and generally regards your organization in a positive light, that audience is more likely to accept your information as accurate.

If, however, the audience does not associate trust and reliability with your message in particular or your sources and organization in general, you may not achieve the results you want.

#### IN CONTEXT

Returning to the original housing authority scenario, did you consider how your letter might be received, or the fear it may have generated in the audience? In real life, you don't get a second chance, but in our academic setting, we can go back and take more time on our assignment. Imagine that you are the mayor or the housing authority director. Before you assign an employee to send a letter to inform residents about the radon finding, take a moment to consider how realistic your purpose is.

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



#### TERM TO KNOW

##### **Credibility**

The perception of a message's integrity based on an association with the source.

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## 3. Communication Channels

From source to receiver, message to channel, feedback to context, environment, and interference, all eight components of communication play a role in the dynamic process.

While writing often focuses on an understanding of the receiver and defining the purpose of the message, the channel - or the "how" in the communication process - deserves special mention.

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

With so many of these digital options, employers increasingly seek to hire and promote individuals with strong **technology skills**. They want employees who not only understand channels like those listed below, but who are also able and willing to improve their skills and learn new tools that may improve communication.



#### THINK ABOUT IT

When is it appropriate to send an instant message (IM) or text message versus a conventional email or fax? What is the difference between a letter and a memo, or between a report and a proposal?

Writing itself is the communication medium, but each of these specific channels has its own strengths, weaknesses, and understood expectations, as summarized in the table below.

Channel	Strengths	Weaknesses	Expectations	When to Choose
IM or Text Message	Very fast; good for rapid exchanges of small amounts of information; inexpensive	Informal; not suitable for large amounts of information; abbreviations can lead to misunderstandings	Quick response	Informal use among peers at similar levels within an organization; best when you need a fast, inexpensive connection with a colleague over a small issue and limited amount of information
Email	Fast; good for relatively quick exchanges of information; "subject" line allows compilation of many messages on one subject or project; easy to distribute to multiple recipients; inexpensive	May be overlooked or deleted without being read; important messages may be lost in long threads; overuse of "reply all" feature	Normally a response is expected within 24 hours, although norms vary by situation and organizational culture	You need to communicate, but time is not the most important consideration; you need to send attachments
Fax	Fast; provides documentation	Receiving issues; long distance telephone charges apply; transitional telephone-based technology losing popularity to online information exchange	Documents will be short in length; normally a long (multiple page) fax is not expected	You want to send a document whose format must remain intact as presented, such as a medical prescription or signed work order; you want to use letterhead to represent your company
Memo	Official but less formal than a letter; clearly shows who sent it, when, and to whom	Memos sent through emails can get deleted without review; attachments can get removed by spam filters	Normally used internally in an organization to communicate directives from management on policy and procedure, or as documentation	You need to communicate a general message within an organization
Letter	Formal; letterhead represents your company and adds credibility	May get filed or thrown away unread; cost and time involved in printing, stuffing, sealing, affixing postage, and travel through the postal system	Specific formats associated with specific purposes	You need to inform, persuade, or deliver bad news or a negative message, and document the communication
Report	Provides extensive research and documentation	Requires significant time for preparation and production	Specific formats for specific purposes; reports are generally to inform	You need to document the relationship(s) between large amounts of data to inform an internal or external audience

Proposal	Provides extensive research and documentation	Requires significant time for preparation and production	Specific formats for specific purposes; proposals are generally to persuade	You need to persuade an audience with complex arguments and data
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In terms of writing preparation, you should review any electronic communication before you send it. Spelling and grammatical errors will negatively impact your credibility. With written documents, we often take time and care to get them right the first time, but the speed of IM, text, or email often omits this important review cycle of written works.

Just because the message you prepare in IM is only one sentence long doesn't mean it can't be misunderstood or expose you to liability. Take time when preparing your written messages, regardless of their intended presentation, and review your work before you click "send."



#### BIG IDEA

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



#### SUMMARY

In this lesson, you learned that effective writing is the result of careful planning and preparation, which begins with **determining your purpose**. Effective writing also takes into account **credibility, timing, and audience**, all of which affect how your message is received. Finally, you learned the importance of considering your **communication channel**, especially as communication on paper is increasingly replaced by various digital channels. Choosing the correct communication channel for your purpose reflects positively on you as a communicator.

Best of luck in your learning!

Source: This tutorial has been adapted from "Business Communication for Success" Version 1.0 by Scott McLean. Copyright 2010. ISBN 978-1-4533-2742-5 (Licensee Product: Workplace Communication), reprinted with permission from FlatWorld.



#### TERMS TO KNOW

##### Credibility

The perception of a message's integrity based on an association with the source.