

# TECHNICAL COMMUNICATION TODAY

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PART

# 4

## Genres of Technical Communication

Chapter 16: Letters and Memos

Chapter 17: Technical Definitions

Chapter 18: Technical  
Descriptions and Specifications

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# CHAPTER 16

## Letters and Memos

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**data**

**reasoning**

**examples**

**facts**

**data**

**Arctic Information Associates**  
2315 BROADWAY, FARGO, ND 58102

July 23, 2004

Customer Service  
Arctic Information Associates

Dear Dr. [Name],

Thank you for your inquiry regarding our Yeti durable products. As you are situated in a harsh, arctic climate, you will be interested to know that the Yeti is designed to withstand the harshest conditions. Here are the answers to your questions:

**Weatherproofing:** The Yeti stands up well to rain, snow, and ice. It can be submerged briefly (a few seconds) and will emerge with a sustained amount of time before it needs to be recharged.

**Drop Protection:** The Yeti can be dropped from a height of 10 feet without significant damage. Its impact-resistant shell is made of a durable, shock-absorbing material.

## GeneriTech

1032 Harner Ave., Philadelphia, PA, 19130

March 29, 2004

George Falls, District Manager  
Optical Instruments  
875 Industrial Avenue, Suite 5  
Starkville, New York 10054

Mr. Falls,

It was a pleasure meeting with you when we visited Starkville last week. I am writing you up on our conversation about how we can help your company's wireless business. A wireless network can help you connect your employees and access problems you may be having. We can also save you the cost of a network.

With this letter, I have enclosed a sample of our wireless products. I would like to see if there is anything that you would like to see. We can provide only brochures and white papers that you would like. I have also enclosed testimonials written by a few of our customers and their experiences with our company.

Please let me know a couple of weeks to see if you have any questions about our wireless products. If you want answers sooner, please call me at 347-555-5282 or e-mail me at lhampton3712@generitech.com. I can answer your questions. Again, thank you for meeting with us last week. I look forward to speaking with you again.

Sincerely,

Lisa Hampton  
Senior Engineer, Wireless

enclosed: brochures

learning

certification

knowledge

expert

understanding

experience

background

## Kearney Engineering

### Memorandum

MEMO

NO

MEMO

## Rockford Services

### MEMORANDUM

Date: May 8, 2004  
To: Brenda Young, VP of Services  
From: Valerie Ansel, Outreach Coordinator  
cc: Hank Billups, Pat Roberts  
Re: Outreach to Homeless Youth

Enclosed is the Proposal for the Rockford Homeless Youth Initiative.

## CHAPTER OBJECTIVES

In this chapter, you will learn—

- The role of correspondence in the technical workplace.
- The basic features of letters and memos.
- How to plan, organize, and draft letters and memos.
- Common patterns for letters and memos.
- How to choose an appropriate style for correspondence.
- How to design and format letters and memos.
- How to revise, review, and proofread letters and memos.

With the invention of e-mail, the role of letters and memos in the workplace has evolved. Not long ago, letters and memos were the predominant way to communicate with others in writing. They were used to convey both informal and formal messages. Today, e-mail is rapidly replacing memos and letters as the preferred way to communicate *informal* messages. Letters and memos are now used mostly to communicate *formal* messages, such as

- results of important decisions
- formal inquiries
- refusals
- new policies
- transmittals of important documents or materials.

The increasingly formal nature of letters and memos ensures that your readers will take them seriously. The paper-based format of a letter or memo signals that the message is too important or too proprietary to send as e-mail.

**TAKE NOTE** Even form letters or sales letters are taken more seriously than they once were because websites and e-mail have given companies less expensive ways to broadcast their messages to clients.

In many ways, letters and memos will be a regular part of your working life, but they can also be a drain on your workday. The key is to learn how to write these documents quickly and efficiently, within the natural flow of your workday. Once you have mastered workplace correspondence, writing letters and memos will become a part of your daily routine.

## Basic Features of Letters and Memos

For the most part, letters and memos are very similar. They look different because they follow different *formats*. But, in the end, they tend to use the same kinds of content, organization, style, and design to put across their message. So, how are they different?

**Letters** are written to people *outside* the company or organization. Primarily, you will need to use letters in formal situations, in which you are acting as a representative of your company. Letters can be used to make requests, make inquiries, accept or refuse claims, communicate important information, record agreements, and apply for jobs.

**Memos** are written to people *inside* your company or organization. They contain meeting agendas, set policies, present internal reports, and offer short proposals. When a message is too important or proprietary for e-mail, most people will send a memo instead. Memos are still more reliable than e-mails for information that should not be broadly released.

Letters and memos are also regularly used as *transmittal documents*. In the workplace, a letter or memo of transmittal is placed on top of another document to explain the document's purpose and clearly state who should receive it. A letter or memo of transmittal helps make sure your document reaches its intended readers.



**TAKE NOTE** Choosing when to write a letter or memo instead of an e-mail is always a judgment call. In some companies, e-mail is expected and appropriate at all times, even for the most formal messages. In other companies, letters and memos are the norm for most correspondence. So, you should be aware of what kinds of correspondence are acceptable in specific situations at your workplace.

Letters and memos share many of the same basic features, though these features look different on the page. Both kinds of documents include the following elements:

- Header
- Introduction
- Body
- Conclusion.

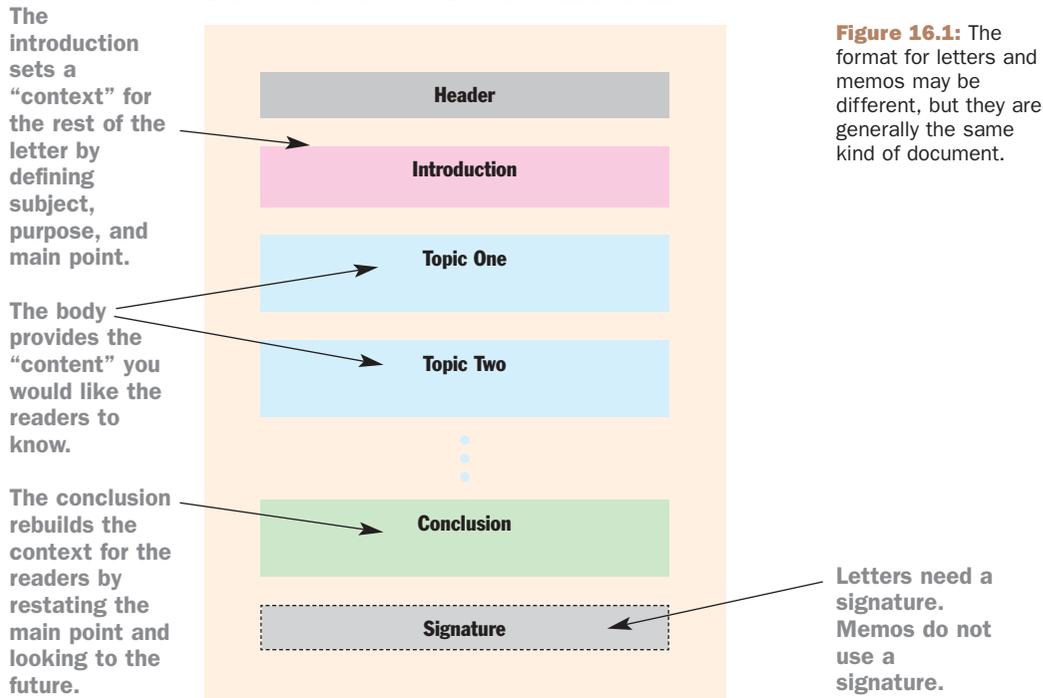
However, letters and memos differ in formatting:

- The format for a letter usually includes these five features: a letterhead, the date, an inside address, a greeting, and a closing with signature.
- The format for a memo usually includes these five features: a header, the date, and lines for the addressee (To:), the sender (From:), and the subject (Subject:).

**TAKE NOTE** A memo does not include a signature, though many people sign their initials next to their name on the From line.

Figure 16.1 illustrates the way most letters and memos are organized.

### Basic Pattern for Letters and Memos



**Figure 16.1:** The format for letters and memos may be different, but they are generally the same kind of document.

As you will notice in Figure 16.1, the basic pattern for letters and memos is similar to other documents. They have an introduction, body, and conclusion. The introduction sets a context up front by telling the readers the subject, purpose, and main point of the letter. The body provides the details the readers need to make a decision or take action. The conclusion often restates the main point and looks to the future.

Figure 16.2 shows a letter and memo with basically the same content, so you can see the differences in formatting.

## Letter and Memo

**Letterhead** → **Kearney Engineering**  
3819 Washington St.  
Austin, TX 78716  
(512) 555-8200

**Date** → September 18, 2004

**Inside Address** → Tom Setter, CEO  
Setter Industries, LLC  
192 High Ave.  
Aurora, IL 60321

**Greeting** → Dear Mr. Setter,

With this letter, I have enclosed our report reviewing your plans to convert the Aurora factory to biomass energy.

Overall, as our report shows, it looks like a biomass generator will work, but we have made some recommendations for improving the design. Specifically, we recommend you consider a design that more finely shreds wood by-products to improve energy yield. We believe this change would allow you to run your factory “off grid” during nonpeak hours of production.

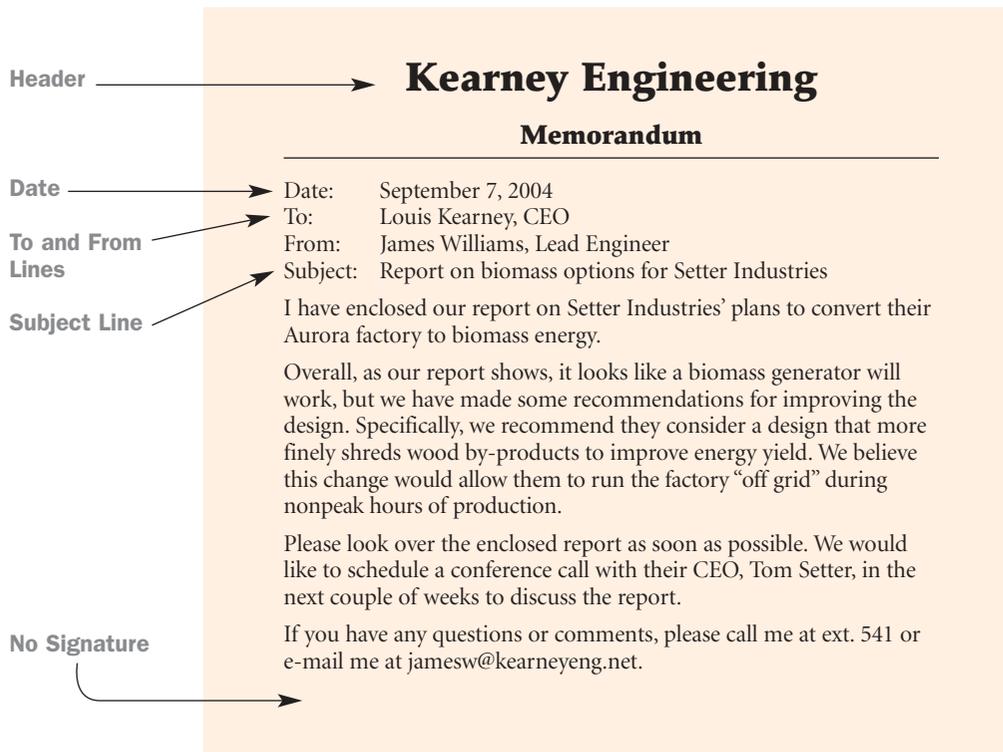
Please look over the report as soon as possible. We would like to schedule a conference call with you in the next couple of weeks to discuss the report.

Thank you for giving us the opportunity to work with you. If you have any questions or comments, please call me at (512) 555-8200, ext. 541, or e-mail me at jamesw@kearneyeng.net.

**Closing with Signature** → Sincerely,  
*James Williams*

James Williams, P.E.  
Lead Engineer  
Kearney Engineering





**Figure 16.2:** Letters and memos are basically the same, except in formatting. The main differences are that letters are written to readers outside the company. Memos are written to readers inside the company.

## Planning and Researching Your Letter or Memo

Most people don't prepare to write a letter or memo. They just do it. This approach works fine for routine letters and memos.

But, as the message becomes more important, you should prepare more thoroughly to write the correspondence. Otherwise, your message may lack a clear point or tend to ramble. In some cases, you may mistakenly provide too much information or use an inappropriate tone.

When you begin writing a letter or memo on your computer, first consider how your readers will use the information you are providing. You might start by answering the Five-W and How questions that describe the writing situation.

*Who is the reader of my letter or memo?*

*Why am I writing to this person?*

*What is my point? What do I want the reader to do?*

*Where will the letter or memo be read?*

*When will the letter or memo be used?*

*How will the readers use this document now and in the future?*



To learn about the history of letter writing, go to [www.ablongman.com/johnsonweb/16.3](http://www.ablongman.com/johnsonweb/16.3)

**Planning and Researching Your Letter or Memo**

## Determining the Rhetorical Situation

If the message is informal or routine, you might be ready to start typing right now. However, if your message is formal or especially important, you should explore the rhetorical situation in more depth. Think more deeply about the subject, purpose, readers, and context of your correspondence.

**SUBJECT** Pay attention to what the readers need to know if they are going to take action. Letters and memos should be as concise as possible, so include only need-to-know information. Strip away any want-to-tell information that will distract the readers from your main point.

**LINK** For more information about distinguishing between need-to-know and want-to-tell information, go to Chapter 5, page 92.

**PURPOSE** The purpose of your letter or memo should be immediately obvious to the readers. To be clear about your intentions, you might include a purpose statement in the first paragraph, perhaps even in the first sentence. Some key words for the purpose might include the following.

to inform	to apologize
to explain	to discuss
to complain	to clarify
to congratulate	to notify
to answer	to advise
to confirm	to announce
to respond	to invite

Your purpose statement might sound like one of the following:

We are writing to inform you that we have accepted your proposal to build the Washington Street overpass.

I would like to congratulate the Materials Team for successfully patenting the fusion polymer blending process.

This memo explains and clarifies the revised manufacturing schedule for the remainder of this year.

Your purpose should be immediately obvious to the readers as soon as they read the first paragraph. They should not need to guess why you are writing to them.

**LINK** For more guidance on defining a document's purpose, see Chapter 2, page 16.

**READERS** Letters and memos can be written to individuals or whole groups of people. Since these documents are often shared or filed, you need to anticipate all the possible readers who might want a copy of your document.

*Primary readers* (action takers) are the people who will take action after they read your message. Your letter or memo needs to be absolutely clear about what you want these readers to do. It should also be tailored to their individual motives, values, and attitudes about the subject.



*Secondary readers* (advisors) are the people to whom your primary readers will turn if they need advice. They may be experts in the area, support staff, supervisors, or colleagues. You should anticipate these readers' concerns, but your focus should still be on the primary readers' needs.

*Tertiary readers* (evaluators) may be more important with correspondence than other kinds of documents. Letters and memos have a strange way of turning up in unexpected places. For example,

- that “confidential” memo you wrote to your research team might end up in your competitor’s hands.
- the local newspaper might get hold of a letter you sent to your company’s clients explaining a problem with an important new product.

Before sending any correspondence, you should think carefully about how the document would look if it were made public. Anticipate how it might be used against you or your company.

*Gatekeeper readers* (supervisors), such as your supervisor or legal counsel, may want to look over an especially important correspondence before it is sent out. You should always keep in mind that you are representing your company in your letters and memos. Your supervisor or the corporate lawyer may want to ensure that you are communicating appropriately with clients.

**LINK** For more information on analyzing readers, turn to Chapter 3, page 42.

**CONTEXT OF USE** Imagine all the different places your letter or memo may be used. Where will readers use this document now and in the future? Where will the document be kept (if at all) after it is read?

Be sure to consider the physical, economic, political, and ethical factors that will influence how your readers will interpret and respond to your message. Put yourself in their place, imagining their concerns as they are reading your document.

**LINK** For strategies to help identify contextual issues, go to Chapter 3, page 45.

The personal nature of letters and memos means that every word, sentence, and paragraph should be carefully measured to reflect the needs of the readers and the documents' context of use. Well-written letters and memos can persuade the readers to take action in positive ways. They can build important personal relationships with the readers that go beyond the corporate connections.

## Organizing and Drafting the Message

Some messages require more time and care than others, but in most cases you should be able to generate them within the natural flow of your workday.

The introductions and conclusions of these texts tend to make some predictable moves. If you memorize these moves, you can spend more time concentrating on what you need to say in the body.

## Introduction That Sets a Context

In the introduction, a letter or memo should make at least three moves. The introduction should be immediately clear about its *subject*, *purpose*, and *main point*. By telling the readers at least these three items up front, you will set a context for the information that follows in the body of the correspondence.

Depending on your message, you might also make two additional moves. You might offer some *background information* and stress the *importance of the subject*.

**SUBJECT** Your subject should be stated or signaled in the first or second sentence of the introduction. Simply tell your readers what you are writing about, and *do not assume* they know what you are writing about.

Recently, the Watson Project has been a source of much concern for our company.

This memo discusses the equipment thefts that have occurred in our office over the last few months.

**PURPOSE** Your reason for writing should also be stated almost immediately in the first paragraph, preferably in the first or second sentence.

Now that we have reached Stage Two of the Oakbrook Project, I would like to refine the responsibilities of each team member.

The purpose of this letter is to inform you about our new transportation policies for low-level nuclear waste sent to the WIPP Storage Facility in New Mexico.

**MAIN POINT** All letters and memos should have a point that you want the reader to grasp or remember. In many cases, “the point” is something you want the readers to do when they are finished reading. In other words, state the *action* you want the readers to take.

We request the hiring of three new physician’s assistants to help us with the recent increases in emergency room patients.

Put bluntly, our subcontractors must meet ISO-9001 quality standards. It is our job to make sure that they comply.

It may seem odd to state your main point up front. Wouldn’t it be better to lead the readers up to the point, perhaps putting it in the conclusion? No. Most of your readers will only scan your message. By putting your main point (the action item) up front, you will ensure that they do not miss it.

**BACKGROUND INFORMATION** Writers often like to start their letters and memos with a statement that gives some background or makes a personal connection with the readers.

Our staff meeting on June 28 was very productive, and I hope we all came away with a better understanding of the project. In this memo . . .

When you and I met at the NEPScore Convention last October, our company was not ready to provide specifics about our new ceramic circuit boards. Now, we are ready . . .



**IMPORTANCE OF THE SUBJECT** In some cases, you might also want your introduction to stress the importance of the subject to the readers.

This seems like a great opportunity to expand our network into the Indianapolis market. We may not see this opportunity again.

If we don't start looking for a new facility now, we may find ourselves struggling to keep up with the demand for our products.

Introductions in letters and memos should be as concise as possible. At a minimum, the introduction should tell the readers your subject, purpose, and main point. Background information and statements about the importance of the subject should be used where needed to connect with the readers.

**LINK** For more information on writing introductions, see Chapter 6, page 84.

## Body That Provides Information

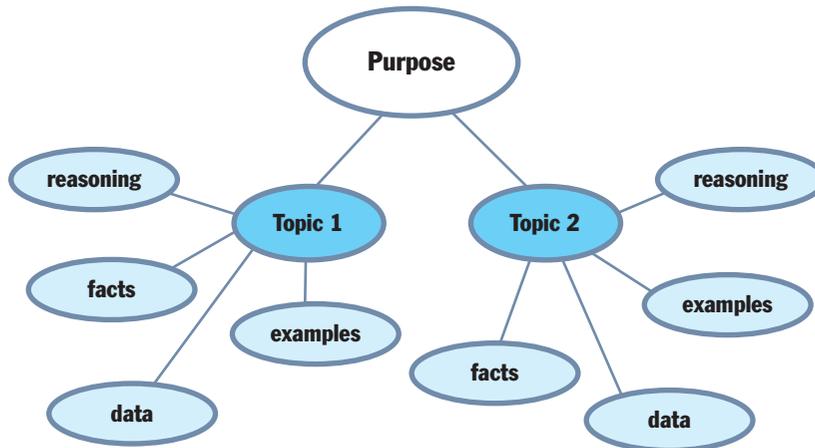
The body is where you will provide the readers with the information they need to know to make a decision or take action. The body is the largest part of the letter, and it will take up one or more paragraphs.

As you begin drafting the body of your letter, think about the *topics* you need to discuss with the readers. For example, an application letter for a job might be divided into three discussion topics: education, work experience, and skills. Each of these topics would likely receive a paragraph or two of discussion.

If you are struggling to develop the content, use mapping to put your ideas on the screen or on a piece of paper (Figure 16.3). Start out by putting the purpose statement in the center of the screen. Then, branch out into topics. You can use mapping to identify any supporting information that will be needed for those topics.

### Using Mapping to Generate Content

**Figure 16.3:** Using your purpose as a guide, identify the topics you will need to cover in your correspondence.



To see some sample letters and memos, go to [www.ablongman.com/johnsonweb/16.6](http://www.ablongman.com/johnsonweb/16.6)

**Organizing and  
Drafting the Message**

As you are drafting the body, keep looking back at your purpose statement in the introduction. Ask yourself, “What information do I need to achieve that purpose?” Then, include any facts, examples, data, and reasoning that will help you support your argument. In other words, make sure you provide all the need-to-know information that your readers require to make a decision or take action.

**TAKE NOTE** Put your claims up front in each paragraph of the body. Then, use facts, examples, data, and reasoning to support those claims.

Also, keeping your purpose statement in mind, you should slice away any want-to-tell information that does not help you achieve that purpose. Because letters and memos are usually short, they should provide only need-to-know information. All that extra want-to-tell information will only cloud your message.

**LINK** For more information on using logical mapping, go to Chapter 5, page 62.

## Conclusion

The conclusion of your letter or memo should be short and to the point. Nothing essential should appear in the conclusion that has not already been stated in the introduction or body.

Conclusions in these documents tend to make three moves: *thank the readers*, *restate your main point*, and *look to the future*.

**THANK THE READERS** Tell them that you appreciate their attention to your message. By thanking them at the end, you leave them with a positive impression.

Thank you for your time and attention to this important matter.

We appreciate your company’s efforts on this project, and we look forward to working with you over the next year.

**RESTATE YOUR MAIN POINT** Remind them of the action you would like them to take.

Time is short, so we will need your final report in our office by Friday, September 15, at 5:00.

Please discuss this proposal right away with your team, so we can make any final adjustments before the submission deadline.

**LOOK TO THE FUTURE** Try to end your letters by looking forward in some way.

When this project is completed, we will have taken the first step toward renovating our whole approach to manufacturing.

If you have questions or comments, please call me at 555-1291 or e-mail me at sue.franklin@justintimecorp.com.

Your conclusion should run a maximum of one to three sentences. If you find yourself writing a conclusion that is more than a small paragraph, you probably need to trim the added information, or you need to move some of it into the body of the letter or memo.

Remember that any action items can be restated in the conclusion, but they should not appear there for the first time. Put them early in the letter or memo.



### Elements of a Letter or Memo

- Header
- Introduction—subject, purpose, main point, background information, importance of the subject
- Body—discussion topics, with usually one paragraph per topic
- Conclusion—thank you, main point (restated), and a look to the future

**TAKE NOTE** In general, conclusions should not include any new information. They should only summarize points that were made earlier in the letter.

**LINK** To learn more about writing conclusions, go to Chapter 6, page 87.

## Types of Letters and Memos

Technical professionals send out letters and memos regularly. This section discusses some of the more common patterns for letters and memos in the technical workplace:

- Inquiry
- Response
- Transmittal
- Claim
- Adjustment
- Refusal.

### Inquiry Letters and Memos

The purpose of an *inquiry* is to gather information, especially answers to questions about important or sensitive subjects. In these situations, you could use e-mail, but a printed document is sometimes preferable because the recipients will view it as a formal request.

Here are some guidelines to follow when writing an inquiry:

- Clearly identify your subject and purpose.
- State your questions clearly and concisely.
- Limit your questions to five or less.
- If possible, offer something in return.
- Thank the readers in advance for their response.
- Provide contact information (address, e-mail address, or phone number).

Figure 16.4 shows a typical letter of inquiry. Notice how the author of the letter is specific about the kinds of information she wants.



For more examples of inquiry and response letters, go to  
[www.ablongman.com/johnsonweb/16.7](http://www.ablongman.com/johnsonweb/16.7)

**Types of Letters and Memos**

## Letter of Inquiry

### **Arctic Information Associates** **2315 BROADWAY, FARGO, ND 58102**

February 23, 2004

Customer Service  
Durable Computers  
1923 Hanson Street  
Orono, Maine 04467

**State the subject and purpose of the letter.**

Dear Customer Service:

**State questions clearly and concisely.**

My research team is planning a scientific expedition to the northern Alaskan tundra to study the migration habits of caribou. We are looking for a rugged laptop that will stand up to the unavoidable abuse that will occur during our trip. Please send us detailed information on your Yeti rugged laptop. We need answers to the following questions:

- How waterproof is the laptop?
- How far can the laptop fall before serious damage will occur?
- How well does the laptop hold up to vibration?
- Does the laptop interface easily with GPS systems?
- Can we receive a discount on a purchase of 20 computers?

**Offer something in return.**

Upon return from our expedition, we would be willing to share stories about how your laptops held up in the Alaskan tundra.

**Thank the readers.**

Thank you for addressing our questions. Please respond to these inquiries and send us any other information you might have on the Yeti rugged laptop. Information can be sent to me at Arctic Information Associates, 2315 Broadway, Fargo, ND 58102. I can also be contacted at 701-555-2312 or salvorman@arcticia.com.

**Provide contact information.**

Sincerely,



Sally Vorman, Ph.D.  
Arctic Specialist

**Figure 16.4:**

A letter of inquiry needs to be clear and concise about the information it is seeking. In this letter, notice how the writer has listed out her questions in an unmistakable way.

## Response Letters and Memos

A *response* is written to answer an inquiry. A response letter should answer each of the inquirer's questions in specific detail. The amount of detail you provide will depend on the kind of questions asked. In some situations, you may need to offer a lengthy explanation. In other situations, a simple answer or referral to the corporate website or enclosed product literature is sufficient.

Here are some guidelines to follow when writing a response:

- Thank the writer for the inquiry.
- Clearly state the subject and purpose of the letter or memo.
- Answer any questions point by point.
- Offer more information, if available.
- Provide contact information (address, e-mail, or phone number).

Figure 16.5 shows an example of a response letter. Pay attention to the author's point-by-point response to the questions in the original letter of inquiry.

## Transmittal Letters and Memos

When you send documents or materials through the mail, you should include a letter or memo of transmittal. Also called “cover letters” or “cover memos,” the purpose of these documents is to explain the reason the enclosed materials are being sent. For example, if you were sending a proposal to the vice president of your company, you would likely add a memo of transmittal like the one shown in Figure 16.6. Earlier in this chapter, the documents in Figure 16.2 also showed a letter and memo of transmittal.

A transmittal letter or memo should do the following:

- Identify the materials enclosed.
- State the reason the materials are being sent.
- Summarize the information being sent.
- Clearly state any action requested or required by the readers.
- Provide contact information.

You should limit your comments in transmittal letters or memos and assume the readers will not read them closely. After all, the readers are mostly interested in the enclosed materials, not your transmittal letter or memo.

Why should you include a letter or memo of transmittal in the first place? There are a few good reasons:

- If a document, like a report, shows up in your readers' mail without a transmittal letter or memo, they may not understand why it is being sent to them and what they should do with it.
- Transmittal letters and memos give you an opportunity to make a personal connection with the readers.
- They also give you an opportunity to set a specific tone for readers, motivating them to respond positively to the document or materials you have enclosed.

An effective transmittal letter or memo welcomes the readers to the materials you have sent.

## Response Letter

### Durable Computers

1923 Hanson Street, Orono, Maine 04467

March 7, 2004

Sally Vorman, Arctic Specialist  
Arctic Information Associates  
2315 Broadway, Fargo, ND 58102

Thank the readers for their inquiry.

Dear Dr. Vorman,  
Thank you for your inquiries regarding our Yeti Rugged Laptop. This computer is one of our most durable products, and it is particularly suited to the kinds of arctic climates you will be experiencing.

State the subject and purpose of the letter.

Here are the answers to your questions:

**Waterproofing:** The Yeti stands up well to rain and other kinds of moisture. It can be submersed briefly (a few seconds), but it cannot be left underwater for a sustained amount of time.

**Damage Protection:** The Yeti can be dropped from 20 feet onto concrete without significant damage. Its magnesium alloy casing provides maximum protection.

Answer the questions point by point.

**Vibration:** The Yeti meets the tough US-MIL 810E standards, which pay close attention to vibration, especially across rough terrain in a vehicle.

**GPS Compatibility:** The Yeti is compatible with all GPS systems we are aware of.

Offer more information, if available.

**Discounts:** We offer a discount of 10% for orders of 10 or more Yetis.

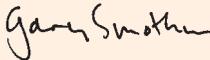
I am also enclosing some of our promotional literature on the Yeti, including the technical specifications. In these materials you will find the results of our endurance testing on the laptop.

We would very much like to hear about your trip and your experiences with the Yeti.

Provide contact information.

If you have any more questions or would like to place an order, please call me at 293-555-3422. Or, I can be e-mailed at [garys@duracomps.net](mailto:garys@duracomps.net).

Sincerely,



Gary Smothers  
Design Engineer  
Durable Computers

**Figure 16.5:** A response letter should answer the inquirer's questions point by point and offer additional information, if available.

## Memo of Transmittal

**Figure 16.6:** A transmittal memo should be concise. Make sure any action items are clearly stated.

**Rockford Services**

---

**MEMORANDUM**

Date: May 8, 2004  
To: Brenda Young, VP of Services  
From: Valerie Ansel, Outreach Coordinator  
cc: Hank Billups, Pat Roberts  
Re: Outreach to Homeless Youth

Enclosed is the Proposal for the Rockford Homeless Youth Initiative, which you requested at the Board Meeting on January 16, 2004. We need you to look it over before we write the final version.

The proposal describes a broad-based program in which Rockford Services will proactively reach out to the homeless youth in our city. In the past, we have generally waited for these youths to find their way to our shelter on the west side of town. We always knew, though, that many youths are reluctant or unable to come to the shelter, especially the ones who are mentally ill or addicted to drugs. The program described in this proposal offers a way to reach out to these youths in a non-threatening way, providing them a gateway to services or treatment.

Please look over this proposal. We welcome any suggestions for improvement you might have. We plan to submit the final version of this proposal to the Board on May 25th at the monthly meeting.

Thank you for your help. You can contact me by phone at 555-1242, or you can e-mail me at [valansel@rockfordservices.org](mailto:valansel@rockfordservices.org).

Enclosed: Proposal for the Rockford Homeless Youth Initiative

**Enclosed materials identified** →

**Reason materials are being sent** →

**Summary of the enclosed materials** →

**Action item clearly stated** →

**Contact information provided** →



## Claim Letters and Memos

In the technical workplace, products break and errors happen. For these situations, you may need to write a claim, also called a complaint. The purpose of a claim letter or memo is to explain a problem and ask for amends. Here are some guidelines to follow when writing a claim:

- State the subject and purpose of the letter clearly and concisely.
- Explain the problem in detail.
- Describe how the problem inconvenienced you.
- State what you would like the receiver of the letter to do to address the problem.
- Thank the reader for his or her response to your request.
- Provide contact information.

Figure 16.7 shows a claim letter with these features.

A claim should always be professional in tone. When errors are made, you might be tempted to send an angry message, full of accusations. Angry letters and memos might give you a temporary sense of satisfaction, but they are less likely to achieve your purpose—to have the problem fixed. If possible, you want to avoid putting the readers on the defensive, because they may choose to ignore you or halfheartedly try to remedy the situation.

## Adjustment Letters and Memos

If you receive a claim letter or memo, you may need to respond with an *adjustment* letter or memo. The purpose of an adjustment letter or memo is to resolve the problem described by the client, customer, or coworker. These documents, though, need to do more than simply respond to the problem. They should also try to rebuild a potentially damaged relationship with the client, customer, or colleague.

Here are some guidelines to follow when writing an adjustment letter:

- Express regret for the problem without directly taking blame.
- State clearly what you are going to do about the problem.
- Tell the reader when he or she should expect results.
- Show appreciation for his or her continued business with your company.
- Provide contact information.

Figure 16.8 shows an adjustment letter with these features.

Why shouldn't you take direct blame? Several factors are usually involved when something goes wrong. So, it is fine to acknowledge that something unfortunate happened. For example, you can say, "We are sorry to hear about your injury when using the Zip-2000 soldering tool." But, it is something quite different to say, "We accept full responsibility for the injuries caused by our Zip-2000 solder tool." This kind of statement could make your company unnecessarily liable for damages.

Ethically, your company may need to accept direct blame for an accident. In these situations, legal counsel should be involved with the writing of the letter.

## Claim Letter

### Outwest Engineering

2931 Mission Drive, Provo, UT 84601 (801) 555-6650

June 15, 2004

Customer Service  
Optima Camera Manufacturers, Inc.  
Chicago, IL 60018

Dear Customer Service:

We are requesting the repair or replacement of a damaged ClearCam Digital Camcorder (#289PTDi), which we bought directly from Optima Camera Manufacturers in May 2004.

Here is what happened. On June 12, we were making a promotional film about one of our new products for our website. As we were making adjustments to the lighting on the set, the camcorder was bumped and it fell ten feet to the floor. Afterward, it would not work, forcing us to cancel the filming, causing us a few days' delay.

We paid a significant amount of money for this camcorder because your advertising claims it is "highly durable." So, we were surprised and disappointed when the camcorder could not survive a routine fall.

Please repair or replace the enclosed camcorder as soon as possible. I have provided a copy of the receipt for your records.

Thank you for your prompt response to this situation. If you have any questions, please call me at 801-555-6650, ext. 139.

Sincerely,



Paul Williams  
Senior Product Engineer

State the subject and purpose of the letter.

Explain the problem in detail.

Describe how the problem inconvenienced you.

State what the reader should do.

Thank the reader for the anticipated response.

Provide contact information.

**Figure 16.7:**  
A claim letter should explain the problem in a professional tone and describe the remedy being sought.

## Adjustment Letter

O C M

Optima Camera Manufacturers, Inc.  
Chicago, IL 60018 312-555-9120

July 1, 2004

Paul Williams, Senior Product Engineer  
Outwest Engineering Services  
2931 Mission Drive  
Provo UT 84601

Dear Mr. Williams,

We are sorry that your ClearCam Digital Camcorder did not meet your expectations for durability. At Optima, we take great pride in offering high-quality, durable cameras that our customers can rely on. We will make the repairs you requested.

After inspecting your camera, our service department estimates the repair will take two weeks. When the camera is repaired, we will return it to you by overnight freight. The repair will be made at no cost to you.

We appreciate your purchase of a ClearCam Digital Camcorder, and we are eager to restore your trust in our products.

Thank you for your letter. If you have any questions, please contact me at 312-555-9128.

Sincerely,



Ginger Faust  
Customer Service Technician

**Express regret for the problem.**

**State what will be done.**

**Tell when results should be expected.**

**Show appreciation to the customer.**

**Provide contact information.**

**Figure 16.8:** An adjustment letter should express regret for the problem and offer a remedy.

## Refusal Letters and Memos

Refusals, also called “bad news” letters or memos, always need to be carefully written. In these documents, you are telling someone something they don’t want to hear. Yet, if possible, you want to maintain a professional or business relationship with those readers.

When writing a refusal, guide the readers logically to your decision. In most cases, you do not want to start out immediately with the bad news (e.g., “We have finished interviewing candidates and have decided not to hire you”). You also do not want to make the readers wait too long for the bad news.

Here are some guidelines for writing a refusal:

- State your subject.
- Summarize your understanding of the facts.
- Deliver the bad news, explaining your reasoning.
- Offer any alternatives, if they are available.
- Express a desire to retain the relationship.
- Provide contact information.

In a refusal letter or memo, keep the apologizing to a minimum. Some readers will see your apologies as an opening to negotiate or complain further. An effective refusal logically explains the reasons for the turndown, leaving the reader satisfied with your response—if a bit disappointed. Figure 16.9 shows a sample refusal letter with these features.

## Choosing an Appropriate Style

The style of a letter or memo can make a big difference. One thing to keep in mind as you consider your style in a letter or memo is—*All letters and memos are personal*. They make a one-to-one connection with the reader.

Even if you are writing a memo to the whole company or sending out a form letter to your company’s customers, you are still making a personal, one-to-one connection with each of those readers. People will read your correspondence as though it is a message written to them individually.

The personal nature of these documents has its advantages and disadvantages:

- The advantage is that your readers will view your letter or memo as something sent directly to them. They will assume that they are interacting with a person (you), not just a faceless company.
- A potential disadvantage is that readers tend to react to these documents in an emotional way. If your correspondence sounds indifferent, rude, or uncaring, your readers are likely to become irritated or angry. Readers respond very negatively to memos or letters that they perceive to be angry, insulting, or condescending.

## Refusal Letter

O C M

Optima Camera Manufacturers, Inc.  
Chicago, IL 60018 312-555-9120

July 1, 2004

Paul Williams, Senior Product Engineer  
Outwest Engineering Services  
2931 Mission Drive  
Provo UT, 84601

**State the subject.**

Dear Mr. Williams,

**Summarize what happened.**

We are sorry that your ClearCam Digital Camcorder did not meet your expectations for durability. At Optima, we take great pride in offering high-quality, durable cameras that our customers can rely on.

**Deliver the bad news, explaining your reasoning.**

According to the letter you sent us, the camcorder experienced a fall and stopped working. After inspecting your camcorder, we have determined that we will need to charge for the repair. According to the warranty, repairs can only be made at no cost when problems are due to manufacturer error. A camcorder that experienced a fall like the one you described is not covered under the warranty.

**Offer alternatives.**

We sent your camcorder to the service department for a repair estimate. After inspecting your camera, they estimate the repair will take two weeks at a cost of \$156.00. When it is repaired, we will return it to you by overnight freight.

**Provide contact information.**

If you would like us to repair the camcorder, please send a check or money order for \$156.00. If you do not want us to repair the camcorder, please call me at 312-555-9128. Upon hearing from you, we will send it back to you immediately.

**Express a desire to retain the relationship.**

Again, we are sorry for the damage to your camcorder. We appreciate your purchase of a ClearCam Digital Camcorder, and we are eager to retain your business.

Sincerely,



Ginger Faust  
Customer Service Technician

Enclosed: Warranty Information

**Figure 16.9:** A refusal letter should deliver the bad news politely and offer alternatives if available. You should strive to maintain the relationship with the person whose request is being refused.

## Strategies for Developing a Style

Here are some strategies for projecting the appropriate style in your letter or memo:

- Use the “you” style.
- Create a tone.
- Avoid bureaucratic phrasing.

**USE THE “YOU” STYLE** When you are conveying neutral or positive information, use the word “you” to address the readers. The “you” style puts the emphasis on the readers rather than on you, the author.

Well done. Your part of the project went very smoothly, saving us time and money.

We would like to update your team on the status of the Howards Pharmaceutical case.

You are to be congratulated for winning the Baldrige Award for high-quality manufacturing.

In most cases, negative information should not use the “you” style, because the readers will tend to react with more hostility than you expect.

**Offensive:** Your lack of oversight and supervision on the assembly line led to the recent work stoppage.

**Improved:** Increased oversight and supervision will help us avoid work stoppages in the future.

**Offensive:** At our last meeting, your ideas for new products were not thought through completely. In the future, you should come more prepared.

**Improved:** Any ideas for new products should be thoroughly considered before they are presented. In the future, we would like to see presenters more prepared.

Don’t worry about whether the readers will notice you are criticizing them. Even without the “you” style, they will figure out that you are conveying negative information or criticisms. By avoiding “you” in these negative situations, though, you will create a constructive tone and avoid an overly defensive reaction from the readers.

**TAKE NOTE** In most cases, you should go out of your way to project a positive tone in letters and memos. Your readers will tend to view a neutral or objective tone as negative.

**LINK** For more advice about choosing an appropriate style, see Chapter 7, page 91.

**CREATE A TONE** As you write your letter or memo, think about the image you want to project to the readers. Put yourself into character as you compose your message. Are you satisfied, hopeful, professional, pleased, enthusiastic, or annoyed? Write your message with that tone in mind.

Mapping is an especially good way to project a specific tone in your letter or memo (Figure 16.10). For example, perhaps you want to establish yourself as the “expert” on a particular subject. Put the word *expert* in the middle of the screen or a piece of paper. Then, start writing down words associated with this word.



To see samples of refusal letters, go to [www.ablongman.com/johnsonweb/16.9](http://www.ablongman.com/johnsonweb/16.9)

**Choosing an  
Appropriate Style**

## Mapping a Tone



**Figure 16.10:** To set a tone, you can use mapping to develop words that are associated with the tone you want to create.

Once you have mapped out the tone you want to create, you can then weave these words into your letter or memo. If the words are used strategically, your readers will subconsciously sense the tone you want to create.

**AVOID BUREAUCRATIC PHRASING** When writing correspondence, especially a formal letter, some people feel a strange urge to use phrasing that sounds bureaucratic:

**Bureaucratic:** Pursuant to your request, please find the enclosed materials.

**Nonbureaucratic:** We have included the materials you requested.

Do you notice how the bureaucratic phrasing in the first sentence only makes the message harder to understand? It doesn't add any information. Moreover, this phrasing depersonalizes the letter, undermining the one-to-one relationship between the writer and reader.

Here are a few other bureaucratic phrases and ways they can be avoided:

<b>Bureaucratic phrase</b>	<b>Nonbureaucratic phrase</b>
Per your request	As you requested
In lieu of	Instead of
Attached, please find	I have attached
Enclosed, please find	I have enclosed
Contingent upon receipt	When we receive
In accordance with your wishes	As you requested
In observance with	According to
Please be aware that	We believe
It has come to our attention	We know
Pursuant to	In response to
Prior to receipt of	Before receiving



## Good Style in Letters and Memos

- Use the “You” Style
- Create a Tone
- Avoid Bureaucratic Phrasing

A simple guideline is not to use words in letters and memos that you would not use in everyday speech. If you would not use words like *lieu*, *contingent*, or *pursuant* in a conversation, you should not use them in a letter or memo.

## Designing and Formatting Letters and Memos

Letters and memos are usually rather plain in design. In the workplace, they typically follow standardized formats and templates that prescribe how they will look.

Most companies have premade word-processing templates for letters and memos, which you can use on your computer. These templates allow you to type your letter or memo directly into a word processor file. When you print out the document, the letterhead or memo header appears at the top.

In some cases, especially with formal letters, you may need to leave room in your document for the letterhead at the top of the paper. That way, when you print the letter on the company’s stationery, the text will appear below the letterhead.

### Formatting Letters

As stated earlier in this chapter, letter formats typically include some predictable features: a header (letterhead), an inside address, a greeting, the message, and a closing with signature (Figure 16.11).

**LETTERHEAD** Companies typically have letterhead available as a premade word processor template or as stationery. Letterhead includes the company name and address. If letterhead is not available, you should enter your return address under the date. Do not include your name in the return address.

December 19, 2004

1054 Kellogg Avenue, Apt. 12  
Hinsdale, Illinois 60521

The return address is best set along the left margin of the letter.

**INSIDE ADDRESS** The address of the person to whom you are sending the letter (called the *inside address*) should appear two lines below the date or return address.

George Falls, District Manager  
Optechanical Instruments  
875 Industrial Avenue, Suite 5  
Starkville, New York 10034

The inside address should be the same as the address that will appear on the letter’s envelope.



Want to see some bureaucratic language in real letters? Go to [www.ablongman.com/johnsonweb/16.10](http://www.ablongman.com/johnsonweb/16.10)

Choosing an Appropriate Style

**David Resnick, Attorney**

ATTORNEY, FOLEY &amp; LARDNER, LLP, CHICAGO OFFICE

*Foley & Lardner LLP is a national law firm providing interdisciplinary services that result in high-value legal counsel.*

**How important is the tone in letters and memos?**

As an attorney, I spend a substantial amount of time every day drafting correspondence to clients and other attorneys, usually in the form of letters and memoranda. Because I know that words on a page can often be construed in a manner not intended by their author, I am always conscious of my tone and word choice whenever I write.

To establish an unambiguous tone in a piece of correspondence, I try to “step into the shoes” of my reader and choose words and phrases that will most effectively evoke the reaction I am seeking. For instance, if I am writing a letter to my client reminding her of an impending deadline, I want to convey a sense of urgency without conveying a sense of panic. She is my client, and my professional duties include both counseling her on the law and protecting her from it. However, when I correspond with opposing counsel regarding a dispute between our clients, I will use a considerably more direct and insistent tone to achieve my result, for I do not owe him the same kind of duty I owe my client.

I will often write to lawyers in a more aggressive manner when defending my client’s position, for my objective in that circumstance is to instill doubt, rather than a sense of security. In both cases, I have to be aware of the words I am choosing, for a single word can affect tone.

**TAKE NOTE** Your word processor can print the inside address on an envelope. Look for the **Envelopes and Labels** function. In some cases, your word processor will pick up the inside address automatically. You just need to print the envelope.

**GREETING** Include a greeting two lines below the inside address. It is common to use the word *Dear*, followed by the name of the person to whom you are sending the letter. A comma or colon can follow the name, although in business correspondence a colon is preferred.

If you do not know the name of the person to whom you are sending the letter, choose a gender-neutral title like Human Resources Director, Production Manager, or Head Engineer. A generic greeting like *To Whom It May Concern* is inappropriate because it is too impersonal. With a little thought, you can usually come up with a gender-neutral title that better targets the reader of your letter.

Also, remember that it is no longer appropriate to use gender-biased terms like *Dear Sirs* or *Dear Gentlemen*. You will offend at least half the receivers of your letters with these kinds of gendered titles.

**MESSAGE** The message of your letter will make up its bulk. As discussed earlier in this chapter, it includes an introduction, body, and closing.

The message should begin two lines below the greeting. Today, most letters are set in *block format*, meaning the message is set against the left margin with no indentation. In block format, a space appears between each paragraph.

## Sample Letter

**Letterhead with Return Address** → **GeneriTech**  
1032 Hunter Ave., Philadelphia, PA, 19130

---

**Inside Address** → March 29, 2004  
George Falls, District Manager  
Optechnical Instruments  
875 Industrial Avenue, Suite 5  
Starkville, New York 10034

**Greeting** → Dear Mr. Falls:

**Message** → I enjoyed meeting with you when we visited Starkville last week. I am writing to follow up on our conversation about building a wireless network for your business. A wireless network would certainly avoid many of the Internet access problems your company is experiencing in its current facility. It would also save you the wiring costs associated with a more traditional system.

With this letter, I have enclosed a variety of materials on GeneriTech's wireless systems. You will find that there is a range of options to suit your company's needs. I have tried to include only brochures and white papers that you would find useful. I have also included testimonials written by a few of our customers about their wireless systems and their experiences with our company.

I will call you in a couple of weeks to see if you have any questions about our wireless products. If you want answers sooner, please call me at 547-555-5282 or e-mail me at lhampton3712@generitechsystems.com. I can answer your questions.

Again, thank you for meeting with us last week. I look forward to speaking with you again.

**Closing with Signature** → Sincerely,  
*Lisa Hampton*  
Lisa Hampton  
Senior Engineer, Wireless Division

enclosed: brochures and white papers

1 blank line  
1 blank line  
1 blank line  
1 blank line  
3 blank lines  
1 blank line

**Figure 16.11:** The format of a letter has predictable features, like the letterhead, inside address, greeting, message, and a closing with signature.



To download letter and memo templates, go to  
[www.ablongman.com/johnsonweb/16.11](http://www.ablongman.com/johnsonweb/16.11)

**Designing and  
Formatting Letters  
and Memos**

**TAKE NOTE** Other formats than block, such as like semiblock (in which the first line of each paragraph is indented), are available. But, block format is considered the standard in most technical workplaces.

**CLOSING WITH SIGNATURE** Two lines below the message, you should include a closing with a signature underneath. In most cases, the word *Sincerely*, followed by a comma, is preferred. Sometimes writers will be more creative and say *Best Wishes*, *Respectfully*, or *Cordially*.

**TAKE NOTE** Avoid being cute with the closing. Phrases like *Your Next Employee* or *Respectfully Your Servant* are unnecessarily risky. Just use the word *Sincerely* in almost all cases.

Your signature should appear next, with your name and title typed beneath it. To save room for your signature, you should leave about three lines between the closing and your typed name.

Sincerely,



Lisa Hampton  
Senior Engineer, Wireless Division

If you are sending the letter electronically, you can create an image of your signature with a scanner. Then, insert the image of your signature in your letter.

## Formatting Envelopes

Once you have finished writing your letter, you will need to put it in an envelope. Fortunately, with computers, putting addresses on envelopes is not difficult. Your word-processing program can capture the addresses from your letter. Then, with the **Envelopes and Labels** function (or equivalent), you can have it put the address on an envelope or label. Most printers can print envelopes.

### Formatting for an Envelope

Return  
Address

**GeneriTech**

1032 Hunter Ave., Philadelphia, PA 19130

Recipient  
Address

George Falls, District Manager  
Optechnical Instruments  
875 Industrial Avenue, Suite 5  
Starkville, NY 10034

**Figure 16.12:** An envelope includes a return address and a recipient address.



An envelope should have two addresses, the *return address* and the *recipient address* (Figure 16.12). The return address is printed in the upper left-hand corner of the envelope, usually a couple lines from the top edge of the envelope. The recipient address is printed in the center of the envelope, usually about halfway down from the top edge of the envelope.

If your company has premade envelopes with the return address already printed on them, printing an envelope will be easier. You will only need to add the recipient address.

## Formatting Memos

Memos are easier to format than letters because they include only a header and message.

**HEADER** Most companies have stationery available that follows a standard memo format (Figure 16.13). If memo stationery is not available, you can make your own by typing the following list:

Date:  
To:  
cc:  
From:  
Subject:

The *Date*, *To*, and *From* lines should include the date, who the memo is addressed to (the reader), and who it is from (you).

The *Subject* line should offer a descriptive and specific phrase that describes the content of the memo. Most readers will look at the subject line first to determine if they want to read the memo. If it is too general (e.g. “Project” or “FYI”), they may not read the memo. Instead, give them a more specific phrase like “Update on the TruFit Project” or “Accidental Spill on 2/2/04.”

**TAKE NOTE** Instead of Subject, some writers and companies prefer the abbreviation *Re* (Regarding). Either *Subject* or *Re* is appropriate in memos.

The *cc* line (optional) includes names of any people who will receive copies of the memo. Often copies of memos are automatically sent to supervisors to keep them informed.

If possible, sign your initials next to your name on the *From* line. Since memos are not signed, these initials serve as your signature on the document.

**MESSAGE** Memos do not include a *Dear* line or any other kind of greeting. They just start out with the message. And, like a letter, they typically include an introduction, body, and conclusion. The block style (all lines set against the left margin and spaces between paragraphs) is preferred, though some writers indent the first line of each paragraph.

Longer memos should include headings to help the readers identify the structure of the text. In some cases, you might choose to include graphics to support the written text.

It is important to note that memos do *not* include a closing or signature. When your conclusion is complete, the memo is complete. No closing or signature is needed.

**LINK** For more ideas about designing documents, go to Chapter 8, page 94.

### Sample Memo

**Header** → **GeneriTech**  
1032 Hunter Ave., Philadelphia, PA 19130

**Initials** → Date: April 10, 2004  
To: Mark Randall, Wireless Installation Team Leader  
cc: James Thorson, Elizabeth Gage  
From: Lisa Hampton, Senior Engineer *LH*  
Subject: Possible New Client

**Message** → I need you and your team to work up some rough specifications and costs on a wireless system for a possible new client. I will need these specifications by next Monday, April 18, because we are talking with the client that day in a conference call.

Here's what is going on. I have been talking with George Falls, who owns Optechanical Instruments, a small optics equipment manufacturer in Starkville, New York. When I visited their manufacturing plant, Mr. Falls was convinced they needed to rewire their whole building. It's an older building, and the rewiring would have cost a bundle. So, I suggested wireless solutions. He seemed interested.

I want you and your team to look over the building schematics I have enclosed with this memo. Just give us a rough estimate of the kind of wireless system that might be appropriate for a building of this size.

I know you need more information to make an accurate assessment of their needs. For now, though, Mr. Falls is looking for an overall sense of what wireless might be able to do for him. If he is still interested, you and I can drive over to Starkville to gain a better understanding of the building and its needs.

**Note: No closing or signature** → Thank you for getting right on this project. If you have any questions, give me a call at extension 5492.

**Figure 16.13:** The formatting of a memo uses a head that differs from a letterhead. Notice that there is no closing or signature.



## Making Letter and Memo Templates

Before computers, personal letters and memos looked rather bland because they had only minimal design features. Only companies could afford letterhead or memo headers.

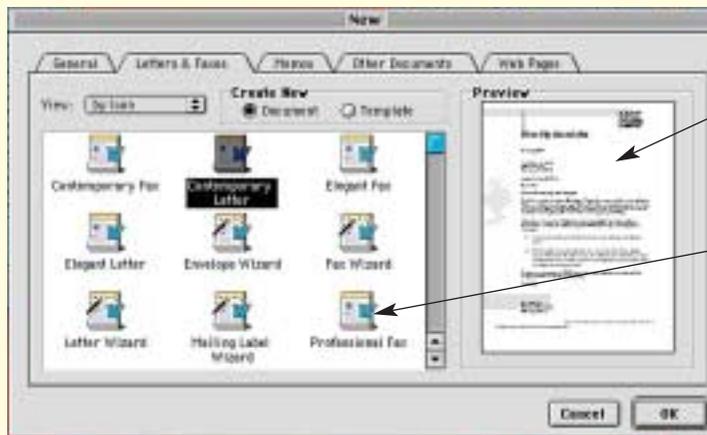
Today, you can use the templates feature in your word-processing program to make your own headers for letters and memos. These templates come in especially handy when you are applying for jobs.

### Using Existing Templates

Almost all word-processing software, like MS Word and Corel WordPerfect, includes a variety of letter and memo templates that you can immediately adapt to your own needs. When you select **New** or **New Document** in your word-processing program, you will be given a choice of different templates you can use (see Figure A).

### Using a Premade Template

**Figure A:** The template feature of your word-processing program allows you to use professional-looking headers in your letters and memos.



Preview of the template

Selection of template options

At this point, you can select the template that most closely reflects the kind of document you need to write. The template will allow you to enter information such as an inside address or greeting. The computer will take care of the formatting of the document though you should always check the format to make sure it looks appropriate when you have added your text.

### Making Your Own Template

You can also make your own templates for letters and memos. In a blank document on your word processor, design a header that reflects your personality. You can add an icon or logo, while including your address (see Figure B).

**LINK** To learn how to download graphics off the Internet, go to Chapter 9, page 96.

**TAKE NOTE** If you are using a graphic, even your college's logo, be sure to ask for permission to use it.



Want to make your own templates? Go to [www.ablongman.com/johnsonweb/16.14](http://www.ablongman.com/johnsonweb/16.14)

**Designing and  
Formatting Letters  
and Memos**

## Personalized Letter Template

### James Chosuke

1923 W. Lincolnway, Ames, IA 50010  
515-555-2315



**Figure B:** You can quickly make up personalized templates for your letters and memos for work. For your personal use you can design a header that fits your personality.

When your template is complete, select **Save As**. In the box that appears on your screen, you will find an option to save the file as a “template.” Once you save the file as a template, the word-processing program will add it to the other templates, so you can use it in the future.

From then on, you can use your template whenever you want. These templates are especially handy when you are doing a job search and need to make numerous form letters.

## Revising and Proofreading

You should always leave some time for revising and proofreading your letter or memo before you send it out. Since these documents are one-on-one forms of communication, readers often become especially annoyed at smaller mistakes.

After you have finished drafting and formatting your letter or memo, reconsider the rhetorical situation in which the document will be used. Pay attention to any information or wording that might annoy or offend the readers.

*Have I included only need-to-know information?*

*Is the purpose of the document stated or obvious in the introduction?*

*Does the document have a point?*

*Is it clear in the introduction what I want the readers to do?*

*How might secondary or tertiary readers use this information?*

*In what other contexts might the document be used?*

*Is the style appropriately formal or informal? Plain or persuasive?*

*Have I properly formatted the document?*

If the message is especially important, let others look it over before you send it out. Your immediate supervisor would be a good person to ask for a critical review. In some cases, you may want to leave the document alone for a couple of hours. That way, you can revise it with a more critical eye.

**LINK** For more advice about proofreading, go to Chapter 10, page 106



Revising and proofreading your work is very important. Since these documents tend to be formal, you want them to represent your best work. Also, keep in mind that letters and memos are often filed, and they have a nasty habit of reappearing at unexpected moments (like performance reviews, court cases, or important meetings). You want them to reflect your true thoughts and your best work.



## CHAPTER REVIEW

- Writing letters and memos can be a drain on your time. You should learn how to write them quickly and efficiently.
- Letters and memos are essentially the same kind of document, called a *correspondence*. They use different formats, but they tend to achieve the same purposes. Letters are used for messages that go outside the company. Memos are for internal messages.
- Letters and memos are always personal. They are intended to be a one-on-one communication to a reader, even if they are sent to more than one person.
- Letters and memos share the same basic features: header, introduction, informative body, and conclusion. They differ mostly in *format*, not content or purpose.
- The introduction should identify the subject, purpose, and point of the correspondence. If you want the readers to take action, put that action up front.
- The body of the correspondence should give the readers the information they need to take action or make a decision.
- The conclusion should thank the readers, restate your main point, and look to the future.
- To develop an appropriate style, use “you” style, create a tone, and avoid bureaucratic phrasing.
- Use standard formats for letters and memos. These formats will make the nature of your message easier to recognize.
- Be sure to revise your work as necessary and proofread it when you are finished.



## Individual or Team Projects

1. Write a memo to an instructor in which you request a letter of reference. Your memo should be polite, and it should offer suggestions about what the instructor should include in the letter of reference.
2. Find a sample letter or memo on the Internet. In a memo to your instructor, discuss why you believe the letter is effective or ineffective. Discuss how the content, organization, style, and design are effective/ineffective. Then, make suggestions for improvement. Sample letters and memos are available at [www.ablongman.com/johnsonweb/16.2](http://www.ablongman.com/johnsonweb/16.2).
3. Think of something that bothers you about your college campus. To a named authority, write a letter in which you complain about this problem and discuss how it has inconvenienced you in some way. Offer some suggestions about how the problem might be remedied. Be sure to be tactful.
4. Imagine you are the college administrator who received the complaint letter in Exercise 3 above. Write a response letter to the complainant in which you offer a reasonable response to the writer's concerns. If the writer is asking for a change that requires a great amount of money, you may need to write a letter that refuses the request.
5. Create a letter template that you can use for your personal correspondence. It should include your name and address, as well as a symbol or logo that adds a sense of style and character to your correspondence.

## Collaborative Project

With a group, choose three significantly different cultures that interest you. Then, research these cultures' different conventions, traditions, and expectations concerning letters and memos. You will find that correspondence conventions in countries such as Japan or Saudi Arabia are very different from those in the United States. The Japanese often find American correspondence to be blunt and rude. Arabs often find American correspondence to be bland (and rude, too).

Write a brief report, in memo form, to your class in which you compare and contrast these three different cultures' expectations in correspondence. In your memo, discuss some of the problems with not being aware of correspondence conventions in other countries. Then, offer some solutions that might help the others in your class become better intercultural communicators.

Present your findings to the class.



## Revision Challenge

The memo shown in Figure A below needs to be revised before it is sent to its primary readers. Using the concepts and strategies discussed in this chapter, analyze the weaknesses of this document. Then, identify some ways it could be improved through revision.

- What information in the memo goes beyond the readers' need to know?
- How can the memo be reorganized to highlight its purpose and main point?
- What is the "action item" in the memo, and where should it appear?
- How can the style of the memo be improved to make the text easier to understand?
- How might design be used to improve the readers' understanding?

Answers to these questions and an electronic version of this memo are available at [www.ablongman.com/johnsonweb/16.17](http://www.ablongman.com/johnsonweb/16.17). There, you can also download the file for revision.

### ChemConcepts, LLC

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**Memorandum**

Date: November 14, 2004  
To: Laboratory Supervisors  
cc: George Castillo, VP of Research and Development  
From: Vicki Hampton, Safety Task Force  
Re: FYI

It is the policy of the ChemConcepts to ensure the safety of its employees at all times. We are obligated to adhere to the policies of the State of Illinois Fire and Life Safety Codes as adopted by the Illinois State Fire Marshal's Office (ISFMO). The intent of these policies is to foster safe practices and work habits throughout companies in Illinois, thus reducing the risk of fire and the severity of fire if one should occur. The importance of chemical safety at our company does not need to be stated. Last year, we had four incidents of accidental chemical combustion in our laboratories. We needed to send three employees to the hospital due to the accidental combustion of chemicals stored or used in our laboratories. The injuries were minor and these employees have recovered; but without clear policies it is only a matter of time before a major accident occurs. If such an accident happens, we want to feel assured that all precautions were taken to avoid it, and that its effects were minimized through proper procedures to handle the situation.

In the laboratories of ChemConcepts, our employees work with various chemical compounds that are can cause fire or explosions if mishandled. For example, when stored near reducing materials, oxidizing agents such as

**Figure A:** This memo needs some revision. How could it be improved?

Continued on next page



To download an electronic version of this revision challenge, go to [www.ablongman.com/johnsonweb/16.17](http://www.ablongman.com/johnsonweb/16.17)

**Exercises and Projects**

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peroxides, hydroperoxides and peroxyesters can react at ambient temperatures. These unstable oxidizing agents may initiate or promote combustion in materials around them. Of special concern are organic peroxides, the most hazardous chemicals handled in our laboratories. These compounds form extremely dangerous peroxides that can be highly combustible. We need to have clear policies that describe how these kinds of chemicals should be stored and handled. We need policies regarding other chemicals, too. The problem in the past is that we have not had a consistent, comprehensive safety policy for storing and handling chemicals in our laboratories. The reasons for the lack of such a comprehensive policy are not clear. In the past, laboratories have been asked to develop their own policies, but our review of laboratory safety procedures shows that only four of our nine laboratories have written safety policies that specifically address chemicals. It is clear that we need a consistent safety policy that governs storage and handling of chemicals at all of our laboratories.

So, at a meeting on November 1, it was decided that ChemConcepts needs a consistent policy regarding the handling of chemical compounds, especially ones that are flammable or prone to combustion. Such a policy would describe in depth how chemicals should be stored and handled in the company's laboratories. It should also describe procedures for handling any hazardous spills, fires, or other emergencies due to chemicals. We are calling a mandatory meeting for November 30 from 1:00-5:00 in which issues of chemical safety will be discussed. The meeting will be attended by the various safety officers in the company, as well as George Castillo, VP of Research and Development. Before the meeting, please develop a draft policy for chemical safety for your laboratory. Make fifteen copies of your draft policy for distribution to others in the meeting. We will go over the policies from each laboratory, looking for consistencies. Then, merging these policies, we will draft a comprehensive policy that will be applicable throughout the corporation.



## CASE STUDY

### The Nastygram

Shannon Phillips is the Testing Laboratory Supervisor at the Rosewood Medical Center. It is her laboratory's job to test samples, including blood samples, drawn from patients. After the samples are tested, one of her technicians returns a report on the sample to the doctor.

Last week, Shannon's laboratory was in the process of transferring over to a new facility. It was a complex move because the samples needed to be walked over on rolling carts to the new laboratory. There was no other way to make the transfer.

Then, the accident happened. One of the technicians who was pushing a cart of blood samples left it alone for a moment. The cart rolled down an incline, into the lobby, and turned over. Samples were strewn all over the floor.

The hazardous materials team cleaned up the mess, but the samples were all destroyed. In an e-mail, Shannon notified the doctors who ordered the tests that they would need to draw new samples from their patients. With her apologies, she tried her best to explain the situation and its remedy.

Most doctors were not pleased, but they understood the situation. However, Dr. Alice Keenan, the Director of the AIDS Center at the hospital, was quite angry about the accident. She wrote the memo shown in Figure A to Shannon.

Needless to say, Shannon was quite upset about the memo. She had done everything she could to avoid the accident, and now a doctor was going to ask the Board of Directors to fire her. At a minimum, she might need to fire her technician, who had never made a mistake up to this point. She was also quite angry about the tone in the letter. It seemed so unprofessional.

If you were Shannon, how might you respond to this situation?

## The Nastygram

# Rosewood Medical Center

*712 Hospital Drive, Omaha, Nebraska 68183*

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### Memorandum

Date: February 13, 2004  
To: Shannon Phillips, Laboratory Supervisor  
From: Dr. Alice Keenan, MD, Director of AIDS Center  
cc: George Jones, CEO Rose Medical Center  
Subject: Your Idiotic Blunder

I cannot believe you morons in the lab ruined the blood samples we sent from our patients. Do you realize how difficult it is to draw these samples in the first place? Our patients are already in great discomfort and in a weakened state. So, asking them for a second blood draw within only a few days is a big problem.

Not to mention the hazardous situation created by this idiotic blunder. Do you realize that someone in the lobby could have come into contact with these samples and perhaps contracted AIDS? Are you too obtuse to realize what kind of horrible consequences your mistake might have caused? You would have made us liable for huge damages if we were sued (which we would be).

Someone down there should be fired over this mistake! In my opinion, Shannon, you should be the first to go. I'm very concerned about your leadership abilities if you could allow something like this to happen. If I don't hear about a firing or your resignation in the next week, I'm going to bring a formal complaint to the Board of Directors at their next meeting.

Are you people all idiots down there? I've never heard of something this stupid happening at this hospital.

**Figure A:**  
Sometimes it is difficult to respond professionally to a nasty memo or letter like this one.