9

Formatting Letters, Memos, and E-Mails

The more elaborate our means of communication, the less we communicate.
—Joseph Priestly, 18th-century English theologian

A standard book has a title page, chapter titles, page numbers, margins, and paragraphs to organize the topics. Readers expect publishers to have this formatting in books. Similarly, readers of business documents have expectations about how those documents should appear. In this chapter, you will learn the standards of formatting for routine documents used in business communication: letters, memos, and e-mails.

Objectives

When you complete Chapter 9, you will be able to:

- **Increase** the readability of your writing by applying standard formatting.
- **Format** letters using standard elements and styles appropriate for business letters.
- **Format** memos using standard elements and styles appropriate for business memos.
- **Use** netiquette when creating and formatting e-mails.

Terms

standard formatting	complimentary close
visual cue	signature
white space	signature block
readability	reference initials
headings	enclosure notation
parallel structure	copy notation
block-style letter	postscript
modified-block-style letter	memos
date	templates
inside address	guide words
salutation	notations
mixed punctuation	blind copy
open punctuation	e-mail
body	netiquette

Go Green

The USB flash drive is becoming a popular alternative to rewritable CDs (CD-RWs). Even though CD-RWs are reusable, they can be easily damaged and may end up in a landfill after just a few uses. USB drives, on the other hand, are more durable, reusable, and easy to carry and store. Have you seen the new ecofriendly bamboo USB drives? Bamboo is one of the fastest growing woody plants on the planet, so this renewable resource is a good choice for the case of a USB drive.

1. Visit your local office supply store or go online to research bamboo flash drives. What did you find out about how bamboo is being used for office products?
2. Do a price comparison of a standard flash drive compared to a bamboo flash drive. Is there a price difference?

Formatting

Business readers expect documents to be set up in a certain way. **Standard formatting** is a generally accepted way to set up a document so its appearance follows a convention. Writers use standard formatting so their business documents are consistent in appearance with what the reader expects. Letters, reports, graphics, headings, and other elements are visual cues that make it easy for the reader to locate and understand information. A **visual cue** is an element the reader sees and interprets to have a particular meaning. For example, a red octagonal sign is a visual cue to a driver to stop at the intersection.

The appearance of a document is the first impression your writing makes on the reader. That first glance at your message should be an open invitation to the receiver. *Format* refers to how written information is presented on the printed page or screen. Another term for format is *layout*. The arrangement of text and graphics in relation to the white space on the page determines the visual appeal to the reader. **White space** includes margins, space between paragraphs, and any other blank space on the page. Without properly formatted elements, the reader can easily become lost or distracted. If your message lacks visual appeal, it may be discarded even before it is read.

Readability is a measure of how easy it is for the reader to understand your writing and locate information within a document. Readability is achieved through a combination of clear writing and effective formatting. Together, these elements help obtain the response you need from the reader.

Writing is most readable when it is presented in small segments with adequate white space. Information presented in long paragraphs is uncomfortable for the reader and physically tiring to read, since the eyes are given few breaks. Putting all of these points together, you can use the following techniques to enhance readability.

- Introduce the message with a short paragraph.
- Use headings.

Reading Prep

As you read this chapter, stop at the checkpoints and take time to answer the questions. Were you able to answer these without referring to the chapter content?

- Use standard fonts and sizes.
- Vary font style.
- Use parallel structure.
- Use formatting and organizational symbols.
- Use high quality paper.

A well-formatted document appears open and inviting. Figure 9-1 shows a poorly formatted document. Figure 9-2 shows an example of how that document can be properly formatted. Always refer to a style manual, such as the *Chicago Manual of Style* or the *MLA Handbook.*

Use an Introductory Paragraph

No one likes to sort through a long paragraph right at the beginning of a document. Write a short opening for the message that concisely introduces the main idea. This paragraph should set up the reader for the information to follow.

Figure 9-1.   **This excerpt from a style manual is a mass of text without formatting elements to aid readability.**

Figures must have captions that explain the content. It is not necessary to start by saying, "This figure shows…" or "The graph contains…" Simply begin by stating the significance of what the reader will see. In most circumstances, the caption appears below rather than above the illustration. The list of figures, which appears on the preliminary pages of the document, must contain each figure's number and the caption as it appears on the figure. With figure captions, always use Arabic numerals. In addition, it is standard to capitalize the first letter of all words except prepositions or articles appearing in the middle of a title. Follow the rules of punctuation as with narrative text.

Figure 9-2.   **The addition of formatting—a heading, paragraphs, and a bulleted list—makes this version of the document shown in Figure 9-2 much easier to read.**

Figure Captions

Figures must have captions that explain the content. It is not necessary to start by saying, "This figure shows…" or "The graph contains…" Simply begin by stating the significance of what the reader will see.

In most circumstances, the caption appears below rather than above the illustration. The list of figures, which appears on the preliminary pages of the document, must contain each figure's number and the caption as it appears on the figure.

These guidelines apply to the format of figure captions.

- Always use Arabic numerals.
- Capitalize the first letter of all words except prepositions or articles appearing in the middle of a title.
- Follow the rules of punctuation as with narrative text.

Use Headings

Headings are words and phrases that introduce sections of text. They organize blocks of information in a document. For example, the heading for this section is Use Headings.

Headings can be used effectively in both short and long documents. When the topic covers more than one key point or important issue, consider using headings. They serve as guideposts to alert the reader to what is coming.

Use Standard Fonts and Sizes

The font, also called the typeface, is the definition of the characters that make up a set of letters, numbers, and symbols. Standard fonts and sizes vary by organization or business. Often, the default font of the word processing application used by a business determines the preferred standard.

The default font and size for body text in Microsoft Word 2007/2010 is 11-point Calibri. Many organizations have adopted this as the standard. However, the traditional standard is 12-point Times Roman (or Times New Roman). Always follow the standard set by your instructor or organization.

For e-mails, it is often accepted to use the default font in e-mail software. Many e-mail–reader applications strip out all formatting. This leaves the reader with "plain text," so any applied formatting is lost.

Use Varying Heading Font Styles

Vary the font size and style in headings to clarify organizational structure. Main headings, which divide long topics into sections, should have the largest font size. Use a smaller font size for subsections or paragraph headings. Bold, italic, and underlining can also be used to show difference in headings.

Too much variation in font size and style within a document is distracting to the reader. A single font is usually sufficient for most business documents. It is rarely necessary or desirable to use more than two or three different fonts in one document.

Readability of a message is important. In business, often a reader has only a brief time to read the message. It must be clear and concise.

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Use Parallel Structure

Parallel structure occurs when similar sections or elements contain similar patterns of words to show they are of equal level. For example, look at the subheads in this main section (Formatting). Each head begins with the word *use*. Parallel structure is easily created when similar words are used in writing in similar ways. Therefore, words in headings, lists, and other elements that form a pattern should be worded in a consistent manner.

When dividing a topic with headings, use the same structure for wording of each. For example, you can begin each heading with an action verb, or *ing* word. Parallel structure will help the reader quickly and easily see how the document is organized.

Use Formatting and Organizational Symbols

Highlight important information or set off related items by using bulleted lists, numbered lists, asterisks, underlining, or boldface type. Numbered lists should be used only when the order of the items is important, such as sequential steps. If the order of the items is not important, use a bulleted list. Always treat lists consistently throughout a document.

Use High-Quality Paper

When publishing letters for hardcopy distribution, make sure you use high-quality paper. This will help the presentation of your information look professional. Photocopier paper may not be the best quality for a business letter. It is a good idea to keep a supply of higher-grade paper to use for important correspondence.

✔ **Checkpoint**
1. What is another term for layout?
2. What function do headings serve?
3. What is another term for typeface?
4. What is the maximum number of fonts that should be used in a document?
5. What is the purpose of a parallel structure?

Formatting Letters

In business, document types are characterized not only by different purposes, but also by different formats. By using the appropriate format, you immediately tell the reader what type of document is being received.

Most businesses have established guidelines for formatting letters, memos, reports, and other documents. Letters are messages printed on stationery and should conform to workplace standards. Businesses generally use one of two standardized letter formats: block or modified block.

The **block-style letter,** as shown in Figure 9-3, is formatted so all lines are flush with the left margin. No indentions are used. Appropriate guidelines for

spacing between the date, inside address, greeting, letter body, and signature block need to be followed.

The **modified-block-style letter** places the date, complimentary close, and signature to the right of the center point of the letter. All other elements of the letter are flush with the left margin. Figure 9-4 shows a letter formatted in the modified-block style. The decision to indent the paragraphs needs to be considered, depending on the guidelines of the workplace.

CASE

Policy Change

Drew Fitzgerald, the manager of a restaurant, needs to have his employees follow the policies established by company headquarters. Recently, he was informed of several changes in the hygiene policy. To relay the information to his employees, Drew reviewed each policy change at an employee meeting. He also planned to write a letter to the employees and post it on the employee bulletin board. Drew drafted the following notice.

NOTICE: CHANGES IN HYGIENE POLICY

Effective August 15, all employees will use a new hand-washing procedure prior to the start of a shift and following any breaks. Workers are to use the new disposable scrub brushes along with antibacterial soap for no less than five minutes of washing. Use the foot-operated sinks and air dryers for washing and drying, respectively. For those whose hands are sensitive to repeated scrubbing, use the antibacterial lotion in the wall dispenser. Also, food handlers must wear disposable gloves for all stages and phases of food handling. This includes preparing soft drinks, which formerly was handled by cashiers. These new procedures will increase our overall level of cleanliness and the safety of our food products. We appreciate your compliance.

1. What format would you recommend that Drew use for his letter, block or modified-block style?

2. Revise and format the letter to improve the readability of this message.

Standard Letter Elements

Block-style and modified-block-style letters have the same line spacing and top, bottom, and side margins. Both also contain the same standard letter elements:
- date
- inside address
- salutation
- body
- complimentary close
- signature
- notations

Figure 9-3.   This letter is formatted in block style with mixed punctuation.

Figure 9-4.   This is the same letter shown in Figure 9-3, but formatted in modified-block style. It also uses open punctuation.

Date Line

The **date** consists of the month, day, and year. The month is spelled in full. The day is written in figures and followed by a comma. The year is written in full and consists of numbers. For example:

❏ December 18, 20--

Inside Address

The **inside address** is the name, title, and address of the recipient. The two examples that follow show how to format an inside address.

> Mr. Angelo Costanzo, Manager
> Griffin Plumbing Supply Co.
> 1987 Susquehanna Avenue
> Wilkes-Barre, PA 18701
>
> Ms. Denise Rodriquez
> President & CEO
> Urban Development Council
> 150 Grosvenor Avenue
> Washington, DC 30005

Note that the state abbreviation is always two letters and in all capitals (all caps).

Salutation

The **salutation** is the greeting in a letter and always begins with *Dear*. This is followed by the recipient's first name or, according to your relationship, title and last name.

There are two types of punctuation used in letters. **Mixed punctuation** is a style in which a colon is placed after the salutation and a comma after the complimentary close. **Open punctuation** is a style in which there is no punctuation after the salutation or complimentary close.

> **Mixed Punctuation**
> Dear Perry:
> Dear Mr. Fisher:
> Dear Katherine:
> Dear Ms. Randall:
>
> **Open Punctuation**
> Dear Perry
> Dear Mr. Fisher
> Dear Katherine
> Dear Ms. Randall

Always address a letter to a specific person, unless you are intentionally directing it to an organization. It may take a phone call or Internet search to get the correct name, but it is worth the effort to personalize business messages. Also, make sure you correctly spell the receiver's name and use the appropriate title: Dr., Mr., or Ms. (Mrs. is rarely used in business writing). Spell out and capitalize titles such as Professor and Reverend. If you are unsure of a person's gender, use the full name:

> Dear Pat Cashin:
>
> Dear Ryan Gulati:

If you need to write a letter without the name of a specific person, do not use traditional greetings, such as *Dear Sir or Gentlemen*. You may use *Ladies and Gentlemen;* however, the best course is to use words that describe the role of the person:

> Dear Customer:
>
> Dear Circulation Manager:
>
> Dear Editor:

Body

The **body** of the letter is the message. Format the body according to the block or modified-block style. Most businesses use the block style. Single-spaced letters are standard; however, some businesses prefer the default setting of the word-processing software used. In Microsoft Word 2007/2010, the default line spacing is 1.15.

When creating a business letter, be sure to follow an accepted format. Readers will expect the letter to have certain elements to guide them through the letter.

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Complimentary Close

The **complimentary close** is the sign-off for the letter. Only the first word is capitalized. Mixed or open punctuation is used in the complimentary close, but be consistent with the style you used in the salutation. The complimentary close follows the body of the letter and is appropriately spaced, as shown in Figure 9-3 and Figure 9-4. The most commonly used closings are:

> **Mixed Punctuation**
> Sincerely,
> Sincerely yours,
> Cordially,
> Cordially yours,
>
> **Open Punctuation**
> Sincerely
> Sincerely yours
> Cordially
> Cordially yours

Signature

The writer's name and title are called the **signature** or **signature block.** The writer's job title and department appear beneath the name, unless a letterhead

is used that contains this information. Begin the signature block below the body of the letter. The blank lines of space are used for the handwritten signature.

Sincerely,

Margaret Shaw
Coordinator
Business Development

When the message writer is designated as the company as a whole, the company name may appear in all-capital letters below the complimentary close. The letter is not signed by the writer in this case.

Sincerely,

JIMENEZ-BRADFORD REALTY

Notations

Letters may include **reference initials.** These indicate who keyed the letter. If the writer keyed the letter, initials are not included. Reference initials are lowercase letters.

Cordially yours,

Margaret Shaw
Senior Vice President

smb

If the person keying the letter is not the person who wrote it, initials are included at the bottom of the letter to indicate who keyed it.

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An **enclosure notation** alerts the reader to materials that are included in the mailing along with the letter. Spell out and capitalize the word *Enclosure.* If there is more than one enclosure, you may indicate the number of items included or list them. The word *Attachment* may be used instead of the word *Enclosure.*

Enclosures

Enclosures: 3

Enclosures: Statement
                      Check
                      Letter

A **copy notation** is needed when others are being sent a copy of the letter. The notation appears below the signature, as shown in Figure 9-3 and Figure 9-4. If there are enclosure notations or reference initials, it appears below these. Use *c* (for copy) or *cc* (for carbon copy or courtesy copy) followed by a colon and a list of the full names of individuals receiving copies.

cc: Tina Ricco
      Gary Kowalski

Additional Letter Elements

There are three additional letter elements that are sometimes used in business letters: attention line, subject line, and postscript. These elements may also appear in personal letters. The following sections discuss these elements.

Attention Line

There is a wealth of resources available to the writer—telephone, Internet, company databases—that make it largely unnecessary to address correspondence without an individual's name. However, if this circumstance does occur, substituting a position or department title for a specific name is a good solution. For example, you may know the marketing manager is to receive the letter, but cannot find the name of the manager. In this situation, it is appropriate to include an attention line that says *Attention Marketing Manager.* This line is positioned as part of the inside address:

Attention Marketing Manager
Urban Development Council
150 Grosvenor Avenue
Washington, DC 30005

Subject Line

A subject line in a letter is used like a subject line in an e-mail. It helps the reader know the content of the message before reading. The subject line may be in all caps or initial caps and the word *subject* is optional. The subject line appears after the salutation and before the body of the letter.

Dear Mr. Ramito:

SUBJECT: MINUTES OF SUMMER MEETING

Thank you for attending the summer meeting of the *Green Entrepreneur* that was held last month in Orlando. We appreciate your attendance and your contribution to this meeting…

Postscript

A **postscript** means *after writing* and is information included after the signature. In business letters, the postscript is no longer used to represent an afterthought. For example, in the past a writer may have included an omission as a postscript, such as:

P.S. I forgot to tell you we're moving. After June 1, you can reach us at our new address.

With the advent of word-processing software, the need for postscripts disappeared. If you discover that something important was omitted from the body of a letter, simply edit the letter and include it.

Occasionally, however, a writer uses a postscript to emphasize or personalize a point. Sales letters often use postscripts for special effect.

] P.S. Remember, our sale ends this Thursday. Don't miss the wonderful savings in store for you!

Use postscripts sparingly. Frequent use of postscripts may suggest to the reader that you did not plan your message.
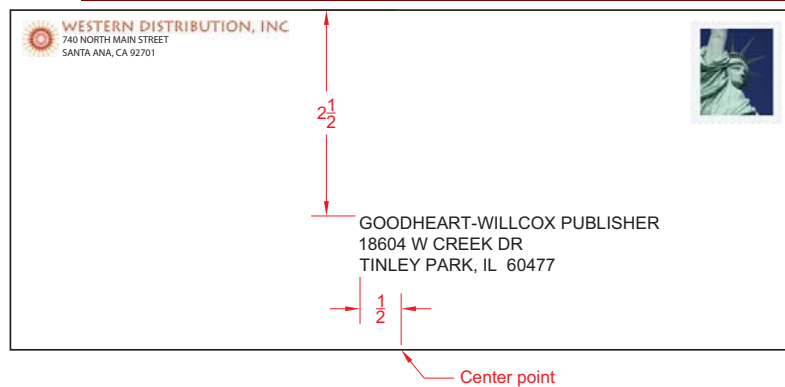
Envelopes

If you are physically mailing a letter, it is necessary to address an envelope. Most businesses generally use a standard size 10 envelope, which is 4 1/8″ × 9 1/2″. The US Postal Service recommends the address be in all capital letters with no punctuation as shown in Figure 9-5.

To properly fold and insert the letter into the envelope, fold the bottom third up, then the top third down. Place the folded letter in the envelope so the dateline is facing up toward the flap of the envelope. The last fold will be at the bottom of the envelope.

✔ **Checkpoint**
1. What style of letter formatting has all elements flush with the left margin?
2. Whose initials are the reference initials?
3. If cc appears at the bottom of a letter, what does this mean?
4. For what is a postscript generally used?

Figure 9-5. When addressing a standard size 10 envelope, use the spacing shown here.

WESTERN DISTRIBUTION, INC
740 NORTH MAIN STREET
SANTA ANA, CA 92701

$2\frac{1}{2}$

GOODHEART-WILLCOX PUBLISHER
18604 W CREEK DR
TINLEY PARK, IL 60477

$\frac{1}{2}$

Center point

Formatting Memos

Memorandums, more commonly called **memos,** are hardcopies used for intra-office communication. Memos are similar to e-mails in purpose and design, but are more effective when the writer wants a printed communication or assumes the reader will want a hardcopy for his or her records. Executives and departments that issue policies and other formal messages often use memos attached to e-mails as a means of communicating with employees.

Memos are usually created and printed on forms with the company name and logo at the top. You may also create memos using **templates,** which are predesigned forms supplied in word processing software. The word *memorandum* or *memo* is in large letters at the top and the **guide words** *to, from, date,* and *subject* appear at the top, as shown in Figure 9-6. These words often appear in all caps.

TEAMWORK

Working in the team assigned by your instructor, research the various standard sizes of envelopes used for business mailings. Make a list outlining each size, an example of its use, and if the standard postage rate can be used to mail it.

Memo Parts

A memo contains certain elements. The next sections discuss the parts of a memo and how they are formatted.

To Line

The name of the recipient(s) appears in the TO: line. Omit courtesy titles (Mr., Ms.). Names may be in list format or on a single line separated with commas.

Figure 9-6. A preprinted memo form may contain this information.

J. WRIGHT & ASSOCIATES

MEMORANDUM

TO:

FROM:

DATE:

SUBJECT :
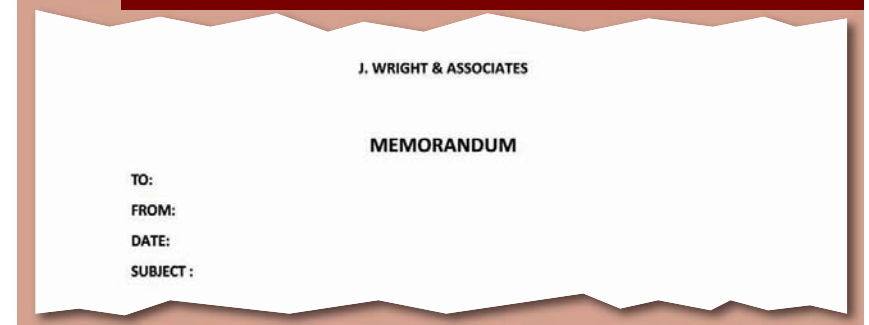
TO: Tyler A. Dembowsky
    Edward Josi
    Jeannette Loria

TO: Tyler A. Dembowsky, Edward Josi, Jeannette Loria

If the list of recipients is very long, you may choose to key the word *Distribution* in the TO: line and list the names at the bottom. The names should be in alphabetic order or in order of position (from highest to lowest) in the company or department.

Distribution:
Tyler A. Dembowsky
Edward Josi
Jeannette Loria
Ann Peabody
David Horowitz

If a memo is being sent to a group of employees, use the name of the group instead of listing all the individual names.

❏ TO: Customer Care Associates

From Line

In the FROM: line, fill in your full name or the name of the person for whom you are keying the memo. It is optional for the sender to initial the typed name before the memo is sent.

❏ FROM: Jose Ortez

The writer may choose to include his or her job title:

❏ FROM: Jose Ortez, Marketing Director

Date Line

The DATE: line contains the date that the memo is being sent. Spell out the name of the month. Include the full year in numbers.

❏ DATE: August 1, 20--

Subject Line

In the SUBJECT: line, indicate the subject in language that clearly states the topic. Be concise. Also, capitalize the main words in the subject line.

❏ SUBJECT: Merit Increases

Body

When keying a memo, begin the message below the subject line, as shown in Figure 9-7. The paragraphs are positioned flush left. Key the message in a single-spaced format with a double space between paragraphs. As in letters, your business may prefer to use line spacing of 1.15, which is the default of Word 2007/2010.

Figure 9-7.   This sample memo is properly formatted.
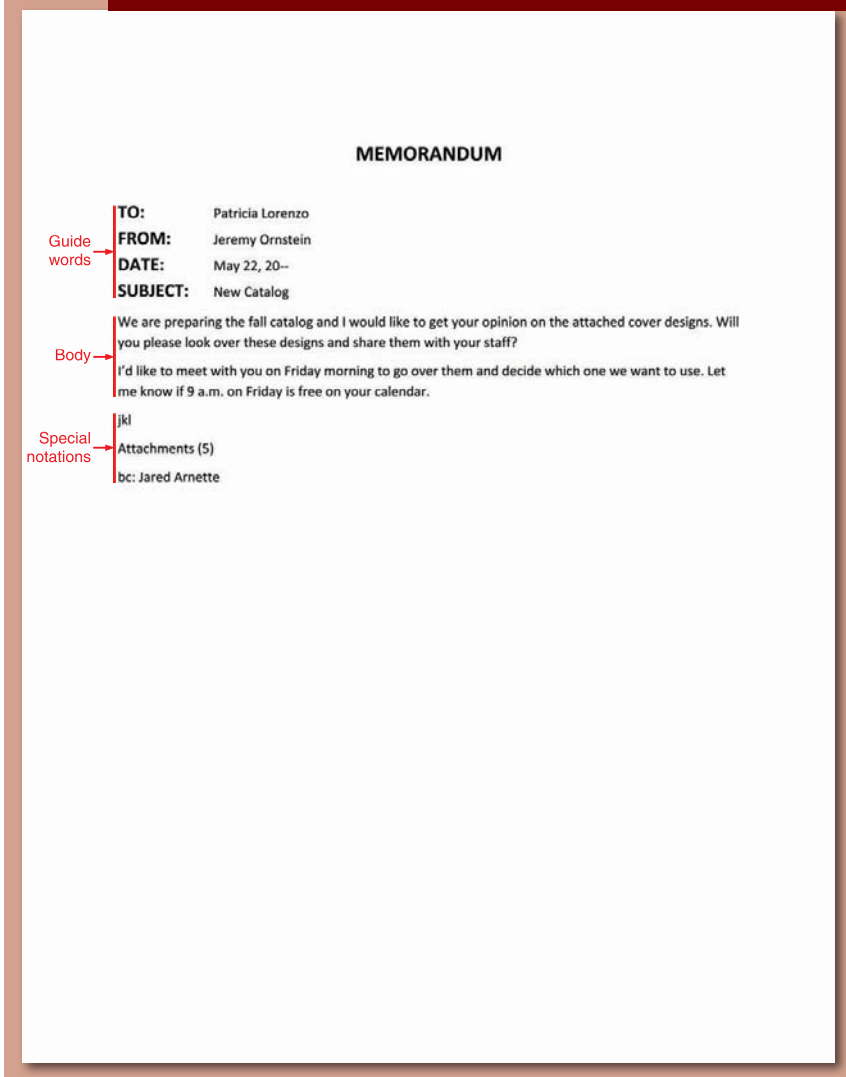
Special Notations

Notations at the bottom of the memo are used to indicate specific things to the reader. For example, *c* or *cc* indicates copies are being sent. Another notation is *bc* for **blind copy,** which is used when you are sending a copy of the memo to someone without the recipient's knowledge.

If copies are being sent to others, add the notation *cc* (for carbon copy or courtesy copy) line and the list of names at the bottom of the memo. The blind copy notation appears at the bottom of the file copy and the copy for the recipient who is blind copied, but not on the copy for the primary recipient.

> cc: Tyler A. Dembowsky
>   Edward Josi
>   Jeannette Loria

Other notations include confidential, attachments, and enclosures. It is traditional to also include the preparer's initials in lowercase when someone other than the writer keys the memo. These notations follow the same formatting guidelines as letters and are shown in Figure 9-7.

> ### ✔ Checkpoint
> 1. What guide words appear at the beginning of a memo?
> 2. List the five elements of a memo.
> 3. In addition to the standard elements, what else may appear on a memo?

Formatting E-Mail

E-mail, which is short for electronic mail, is a major vehicle for business communication. **E-mail** is a message that is created, sent, and received digitally (electronically).

The following sections discuss standards for business e-mails. Businesses generally have policies for using e-mail as well as disclaimers and other guidelines for sending e-mail correspondence. Figure 9-8 shows an example of e-mail completed in business style. E-mail is formatted similarly to a printed memo.
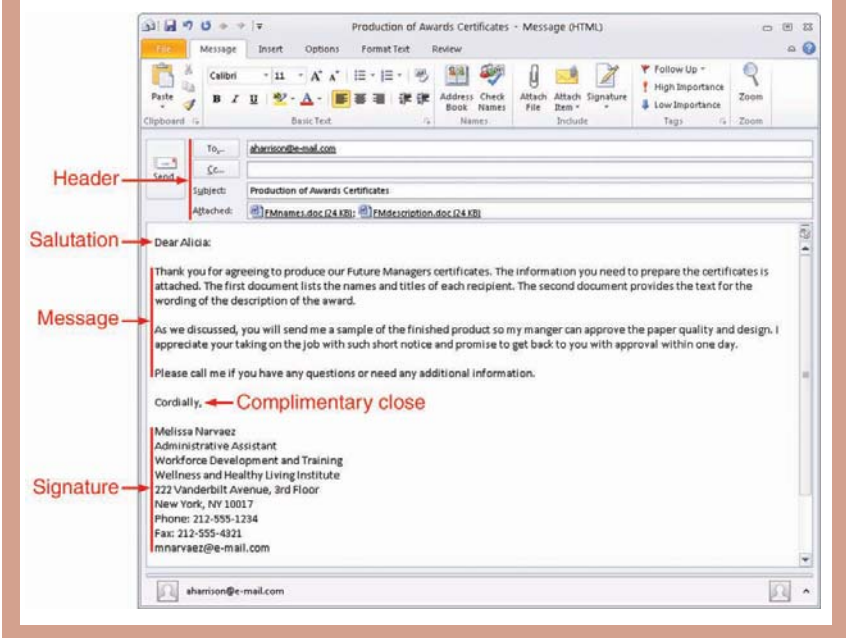
Header

In the TO: line, key the names of the recipients from whom you want a response or who have a primary interest in the topic. Use the COPY: line for names of those who are receiving the information as secondary recipients. Normally, a reply is not expected from those who are copied.

Figure 9-8.   This e-mail is properly formatted.

You may opt to send blind copies, but use this option sparingly. In most business situations, it is courteous to let the reader know all who are receiving the e-mail. However, for an e-mail sent to a large number of people outside of an organization, it is courteous to use the blind copy function to ensure the e-mail addresses of the recipients remain private. If all recipients are listed in the BLIND COPY: line, the only e-mail address each recipient can see is the sender's address.

Limit the subject of each e-mail to one topic and clearly and concisely state the subject. For example, a subject of "Hello" is not suitable, but "Business Report 8-14" may be appropriate. By focusing the topic and the content of the e-mail, readers can more easily keep track of subsequent replies.

Salutation

E-mail tends to be more informal than letters. In most businesses and organizations, people address each other by their first names in e-mails. You may use the salutation "Dear" as in a letter, depending on whether you are

writing a formal or informal e-mail. Some companies have adopted the style of using very informal salutations, such as addressing customers by first name.

If your company policy is to use informal forms of address, even to outside customers, you must follow the policy. However, the general rule is to use traditional salutations. Use your judgment based on your relationship with the recipient and the rules of your organization. If you address the recipient by first name in person, it is usually correct to do the same in written communication.

Message

Format the e-mail message the same as you would a letter or memo. Use appropriate spacing, as shown in Figure 9-8. Adhere to netiquette when writing both personal and business e-mails. Netiquette, or Internet etiquette, is a set of guidelines for appropriate behavior on the Internet, including e-mail, and should always be followed. These rules include the accepted standards within the organization as well as general standards that apply externally. When you are sending e-mail as a representative of your business, use Standard English—correct grammar, punctuation, spelling, and usage—and the spelling check feature before sending. Remember, you are in a business environment and your e-mail could be forwarded to others who might make judgments about what you have written.

Complimentary Close and Signature

E-mails often take the place of routine phone calls and face-to-face conversations with colleagues and external business associates. Writers often forego including a closing and formal signature in these kinds of messages. However, a courteous *Thanks* or *Thank you* at the end of the message is usually appropriate for business correspondence. This is a judgment call for the writer or a matter of organizational standards.

For e-mails that are used in place of a letter, it is important to include a complimentary close just as you would in a printed letter. It is standard to include your full name and contact information at the bottom of the e-mail for the convenience of the reader.

E-mail programs allow you to set up the signature to be automatically inserted. In the signature block, include your name, job title, department, and contact information. It is customary to include the e-mail address in the signature, since many e-mail–reader programs display the sender's full name instead of the e-mail address.

Attachments

Take care when sending attachments to ensure the recipient can handle the size and type of file. Many e-mail servers have limits on the size of files that can be received. Also, because viruses can be spread through attachments, you might want to check to make sure the recipient is comfortable receiving attachments or to notify them that an e-mail you will be sending will contain an attachment. It is standard practice in business to delete, without reading, any e-mail that has an attachment unless the attachment is expected.

CASE

Is the Meeting On?

Jeanine Flanders is the assistant manager of Greenway West, a resort in Tampa, Florida. Jeanine regularly corresponds with clients who plan to visit Greenway West for both business and pleasure.

In September, Corey Bingham inquired about holding a meeting at the resort in December. By mid-October, Mr. Bingham had not responded to the letter and information packet that Jeanine mailed the day after receiving the inquiry. As of October 16, the December dates she had discussed with Mr. Bingham were still open. Jeanine decided to write to Mr. Bingham to encourage him to make his decision. Here is the message she wrote:

> When you called me in September about accommodations for your December 3–7 meeting, I tentatively reserved a block of meeting and residence rooms for your group. Although you did not ask me to do so, I wanted to make certain I had rooms for you in case you decided to choose Greenway West for your conference.
>
> If you are still thinking about having us host your conference (and I certainly hope you are), I will need to hear from you by October 25. This is the latest date on which I can guarantee accommodations for the dates you requested.
>
> Since we last spoke, the resort has added a solarium with an indoor pool plus a very spacious sauna. I've enclosed a colorful brochure to let you see for yourself. I hope yours is one of the first groups to use these new facilities!

1. Should Jeanine send this message as a letter, memo, or e-mail? Why?
2. Format this message to create a final document. Use your choice of letter, e-mail, or memo.

E-Mail Replies

Respond as quickly as possible to e-mails. Stay with the original topic in your reply. If you want to bring up a new topic, send a new e-mail and note the topic in the subject line. Creating a new e-mail with a new subject line makes it easier to keep the information flow understandable. Additionally, it allows both the sender and recipient of the e-mail to electronically file and organize the e-mail.

When you are out of the office, use the automated reply feature to send a message stating when you will return. This is a professional courtesy so the sender knows you are unavailable and not being careless about responding.

Useful E-Mail Features

Use of e-mail can be made more efficient by taking advantage of the many convenient features that most systems provide. The following sections discuss productivity tools common to most e-mail software that help you manage e-mail.

E-mail is an important part of business communication. Always use netiquette when composing e-mail.

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Address Book

The contacts or address book lists the names of all employees on the system and inserts the name when you key a few letters. Many similar names might be in the system, so always check to make sure the correct names are listed before clicking the Send button. Address books also have search features to help you find names and other information, such as employee job title, location, and phone number.

Send Options

Send options let you set criteria before you send an e-mail. Some of the criteria that can be set include level of urgency, confidentiality, and being notified when the e-mail is opened or deleted.

Reply Options

The reply options allow you to determine who receives the reply. You can choose to reply only to the sender or to all recipients of the e-mail. Most e-mail readers also have a setting for including the original message beneath the reply. The e-mail subject line is usually given the prefix RE: to indicate it is a reply.

Forward

The forward option allows you to send a message you receive to a new recipient. The e-mail subject line is usually given the prefix FW: to indicate it is forwarded message. Once you click the Forward button, you can add multiple e-mail addresses to the TO: line.

Folders

Folders are used to store e-mails you have sent or received. You can also store drafts of e-mails you are planning to send. Folders can be set up by topics, names, or any other filing system you prefer. If your organization has a standard filing system, be sure to use it.

Views

The view feature allows you to sort e-mails in various views. For example, you can choose to sort by names, topics, dates, size, or other criteria. Sorting by name is a quick way to see all e-mails you have received from a particular coworker.

Trash

E-mails that you delete are sent to the trash folder. Depending on how your e-mail software is set up, e-mails in the trash folder may be immediately discarded or kept until you manually empty the folder. Be sure to check the settings for emptying the trash as some e-mail readers have an automatic emptying setting. Once an e-mail is removed from the trash folder, it cannot be retrieved.

> **BUSINESS ETHICS**
>
> **Ethical Messages**
>
> There will be instances when it is necessary to write a sales message or other type of documents for your organization. Even though it may be tempting to focus on sales "hype" or other persuasive techniques to convey a message, remember to keep the information honest. Embellishing a message about a product or service or intentionally misrepresenting a product or service is unethical and may be illegal. There are truth-in-advertising laws that must be followed. Focus on the truths of the message and use your communication skills in a positive manner to create interest or demand for the product or service. Search the Internet to find out more about truth-in-advertising laws.

Calendars and Planning Tools

Many e-mail systems include tools that help you plan and organize your work. These tools are like a handheld daily planner. You can schedule meetings, set reminder alarms, and schedule reoccurring tasks.

✔ **Checkpoint**
1. What does the header of an e-mail contain?
2. What is the general rule used to determine if you can address somebody by their first name in an e-mail?
3. Why should you alert a recipient that an e-mail you will be sending will contain an attachment?
4. In addition to following netiquette, what should you do in an e-mail?

Chapter 9 Review

Chapter Summary

Formatting

- Making a professional impression with your written correspondence is important in any business situation.
- The use of white space and graphics will make the information easy to read.
- Readability is a measure of how easy it is for a reader to understand your writing and locate information within the document.

Formatting Letters

- Letters may be block style or modified-block style and either open or mixed punctuation can be used.
- Business letters have standard elements that include date, inside address, salutation, body, complimentary close, and signature.
- Additional elements in a business letter may include an attention line, subject line, and notations.

Formatting Memos

- Memos are generally used for interoffice communication.
- Memos have a heading that consists of the guide words TO, FROM, DATE, and SUBJECT.
- There is no salutation or closing for a memo, but special notations may be used.

Formatting E-Mail

- E-mails are commonly used in business and are formatted similarly to a memo.
- Business e-mails should have a salutation and closing.
- Use good business judgment when sending e-mail and observe the rules of netiquette.
- Take advantage of the productivity tools offered by most e-mail software.

Review
Your Knowledge

1. Explain standard formatting.
2. What is parallel structure?
3. How does a block-style letter differ from modified-block-style letter?
4. List the seven common elements of letters.
5. What is the difference between open punctuation and mixed punctuation?
6. List the three additional elements that may be used in a business letter.
7. What is a postscript?
8. Describe a memo and its purpose.
9. Related to formatting, what is an e-mail similar to?
10. Explain netiquette.

Apply
Your Knowledge

1. Rewrite the following draft of a business letter so that it is properly formatted to increase its readability. Use a block format with open punctuation.

   Ms. Genevieve LeMond 7214 Mulberry Street DeKalb, IL 61616 June 20, 20--

   Dear Genevieve. I am sorry I cannot be at the PER meeting for the final, official goodbye to you as a fellow pollution-control champion. I personally want to communicate how strongly I feel about you as a mentor. No one can prepare better waste-containment strategies, rally support for earth-friendly activities, or use her knowledge more effectively

to make changes at the community level! I've also admired your ability to communicate with officials at large corporations and persuade them to support our grassroots efforts. Now, as you enter a new life phase of your career, I hope you find new challenges to attack with your talents. And whatever you choose to pursue next, may it bring you satisfaction. Sincerely. Minerva Harvet Executive Director

2. Write a suitable subject line for the following memos. Create the memos and format them using accepted standards.

   A. You need to ask your supervisor for approval to take two personal days to attend your sister's graduation in another state.
   B. A vice president of sales is asking the sales staff to work overtime to complete the end-of-year inventory.
   C. You are a marketing coordinator asking your manager's staff members for their April expense reports by May 25 because you will be on vacation May 29–June 5.
   D. You are a supervisor asking members of the accounting department to attend a seminar on a new accounting system for payroll production.

3. You work at the Woodlake History Center. Each year the center hosts an employee family picnic. This year you are the picnic committee chair. Write an e-mail to your committee members to tell them the date, time, menu, and activities planned for the picnic (supply your own details). Use formatting such as bullets, asterisks, numbers, underlining, and boldface type to emphasize important information.

4. What type of written communication—letter, memo, e-mail—would you select in each of the following situations? Explain your answers.

   A. You need to convince your supervisor to increase the advertising budget by 10 percent.
   B. You want to tell your customers about a new credit policy.
   C. The company's stockholders want a detailed analysis of last quarter's income statement.
   D. The manufacturing arm of the Tyler Company in New York City wants to tell the marketing division, located in Boston, the specifications of a new product.
   E. You want to congratulate a recently promoted coworker.

Practice
What You Have Learned

Access the *Fundamentals of Business Communication* Student Companion Web Site at www.g-wlearning.com/Communication. Download each data file for this chapter. Follow the instructions to complete a reading, writing, and grammar activity to practice what you have learned in this chapter.

Connections
Across the Curriculum

Math. Create a grid with the words *letters, e-mail,* and *memos* on the X axis. On the Y axis, write the elements of a letter, memo, and e-mail. Put check marks in the columns to show which parts the three have in common. Write a paragraph to explain how each is different from, yet the same as, the others.

Language Arts. How is texting or instant messaging used in business today? Write several paragraphs describing how it is used, why it is used, and the pros and cons of using texting in businesses.

Build
Your Business Portfolio

Your portfolio should showcase samples of work you have completed that demonstrate your talents. Whether it is writing, photography, or other activity, you should showcase the best examples. Now is the time to start collecting items, which you can edit later. Go through past assignments where you wrote a research paper, book report, or similar project that demonstrates your writing talents.

1. Save document files of your best work in your ePortfolio folder. Create a subfolder named Talents. Save each report in the subfolder with the file names Talents01, Talents02, etc.

2. Place a printed copy in your container for your print portfolio.

Careers
Human Services
Careers and Communication

Careers in human services relate to family and personal needs. If you like to help others, one of these careers may be for you. People who enter careers in this cluster often desire to protect, nurture, or provide services for others in need. Career pathways include services in early childhood development, counseling and mental health, family and community, personal care, and consumer services.

Careers in human services require correspondence to clients, both verbally and in written communication. Give examples where letters, e-mails, or memos might be used in a career in human services.

Event Prep

Word Processing

Competitive events for word processing will be a timed activity in which documents will be produced. This event will demonstrate not only your ability to key documents, but your technology and communication skills. As a part of this event, it will be necessary to proofread and edit your documents before submitting them for grading.

To prepare for the word processing test, do the following.

1. Review formatting rules in this chapter and parts of letters, e-mails, and memos.

2. Study the proofreading checklist in Chapter 7. This will help you master the process and understand the techniques of proofreading.

3. Review the proofreader marks in Chapter 7. These proofreading marks are commonly used and you should feel comfortable if requested to proofread and mark corrections on a document.

4. Practice keying, proofreading, and editing actual documents. Ask your instructor to give you feedback.

A career in human services requires strong communication skills.