Communicating with E-Mail and Memos

When you need to communicate with colleagues or anyone else in your organization, send an e-mail message or printed memo. E-mail is the most popular way to exchange information in organizations and is an indispensable productivity tool. You can use an e-mail message to collect information, respond to requests, or confirm decisions, for example. A memo is appropriate when you want to create a permanent or more formal record. In this unit, you learn how to compose professional e-mail messages and memos.

As an assistant at Quest Specialty Travel, you are helping Keisha Lane, the vice president of operations, develop new types of tours. Keisha recently negotiated an agreement with Olympus Cruise Lines so that Quest can add cruise options to its tour packages. She asks you to write a series of e-mail messages and memos to inform the tour developers about the new cruises.

OBJECTIVES

Understand e-mail messages and memos
Compose the main elements of messages
Create professional e-mail messages
Construct professional memos
Write request messages
Write response messages
Write bad-news messages
Write documentation messages
Understanding E-Mail Messages and Memos

An e-mail message is communication composed on and sent with electronic mail technology. A memo is a hard, or printed, copy of a document written for people within a single organization. E-mail messages and memos are standard forms of business communication that inform employees, articulate policies, request information, provide responses, and verify decisions. Figure A-1 shows examples of a professional e-mail message and a memo. However, as described in Table A-1, each one serves a different purpose.

Before you write the first message for Keisha, you review the guidelines for composing professional e-mail and memos.

Before writing an e-mail message or memo, answer the following questions:

- **What are the purpose and audience of the message?**
  Start by analyzing what you want to accomplish by sending an e-mail or distributing a memo—that purpose should be the main subject of the message. Also clearly identify your audience. A message you write to colleagues can have an informal tone, while a message for your manager should be more professional.

- **Should you create an e-mail message or memo?**
  E-mail messages are generally shorter, more immediate, and less formal than memos. They can also include electronic information stored on your computer, network, or the Internet.

Use e-mail to perform the following tasks:

- **Communicate ideas and information to others in an organization**
  E-mail is popular because it lets you quickly exchange short messages, especially those that request a quick response, confirm a decision, or provide brief information.

- **Notify people of changes in upcoming plans**
  When time is a factor, e-mail is ideal for communicating changes such as rescheduled meetings, project updates, and deadline extensions.

- **Request information or action and reply to requests**
  Instead of making a phone call, send an e-mail message requesting information so that your colleagues can refer to a written record of your question or request to take action. E-mail programs also make it convenient to reply to a message from someone else and include the text of their original message in your response.

- **Make announcements to many people**
  Because you can easily send an e-mail message to many people at the same time, use it to announce changes such as a job vacancy, new product, or promotion.

Use memos to perform the following tasks:

- **Create a permanent record**
  Circulate memos when you need a physical record of the communication, such as to list procedures, provide instructions, or post an announcement in a central location.

- **Communicate a formal message**
  Written memos are more formal than e-mail messages, making them appropriate for official communications such as corporate policies, employment decisions, and other important matters.
TABLE A-1: Appropriate uses for e-mail and memos

<table>
<thead>
<tr>
<th>scenario</th>
<th>use e-mail</th>
<th>use memo</th>
<th>use other</th>
</tr>
</thead>
<tbody>
<tr>
<td>Many people need to receive the same short message</td>
<td>•</td>
<td></td>
<td></td>
</tr>
<tr>
<td>You want quick answers to one or more questions</td>
<td>•</td>
<td></td>
<td></td>
</tr>
<tr>
<td>You are responding to a colleague's e-mail</td>
<td>•</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Your manager asks you to confirm a decision</td>
<td>•</td>
<td></td>
<td></td>
</tr>
<tr>
<td>You are inviting others to a meeting</td>
<td>•</td>
<td></td>
<td></td>
</tr>
<tr>
<td>You are updating a simple procedure</td>
<td>•</td>
<td>•</td>
<td></td>
</tr>
<tr>
<td>Meeting participants need to review the details of a plan</td>
<td>•</td>
<td></td>
<td></td>
</tr>
<tr>
<td>You are circulating a new set of formal company policies</td>
<td>•</td>
<td></td>
<td></td>
</tr>
<tr>
<td>You want to express enthusiasm to a colleague</td>
<td></td>
<td></td>
<td>Phone call or visit</td>
</tr>
<tr>
<td>You need to resolve a conflict</td>
<td></td>
<td></td>
<td>Face-to-face meeting</td>
</tr>
<tr>
<td>Your message is confidential</td>
<td></td>
<td></td>
<td>Letter enclosed in an envelope</td>
</tr>
</tbody>
</table>

E-mail messages can be sent to more than one person
Subject line reflects the main purpose of the message
Message body provides information
Printing on company letterhead makes the memo more formal
Memo is sent to someone in the same organization
Provides a hard-copy or permanent record of the information

FIGURE A-1: Sample e-mail message and memo

To: Keisha Lane, Rion Dawson
From: Marianne Durand MD
Date: April 25, 2011
Re: Summary of Olympus cruises

As you requested, I worked with Rion Dawson to review the cruise descriptions that Olympus Cruise Lines sent us. Our main goal was to review the descriptions so they can be distributed to Quest tour developers. I also confirmed information about cruise popularity with a
Composing the Main Elements of Messages

Whether you are writing an e-mail or composing a printed memo, your messages should include four basic elements: (1) a subject line that offers a preview of your message; (2) an opening sentence that communicates your main idea; (3) a message body that explains, supports, or justifies your ideas; and (4) an appropriate closing statement. Figure A-2 shows an e-mail message with these four elements.

Keisha asks you to send an e-mail message to the tour developers to set up a conference phone call.

1. Subject line
   Use a concise phrase that summarizes the main idea of your message. Busy people often decide whether to open an e-mail message based on the subject line. For example, “Meeting on Tuesday at 10:00” and “Report on fall trade show” are effective subject lines, while “Important,” “Problems,” and “Meeting” are not. Table A-2 lists the do’s and don’ts for including subjects and other basic e-mail elements.

2. Opening sentence
   Communicate the main idea of your message in the first sentence. You can do this by restating and expanding the subject line, as in “Let me know if you can attend the project meeting scheduled for Tuesday, April 4, at 10:00 A.M.” If you are delivering bad news, however, you should start with a softer approach.

3. Message body
   Support your main idea with additional information that explains why you are writing the message. Limit the message to a single topic, and organize the material to make it easy to read. For example, use short sentences, headings, lists, tables, and graphic highlighting techniques such as boldface and bullets. Avoid long paragraphs of text.

4. Closing statement
   End the message with a statement that requests specific action from the reader, cites a deadline, summarizes the key points in a complex message, or closes with a positive thought. For example, “Please submit your product descriptions by September 3” is an effective call to action. If you are writing a simple message that does not request action, close with a courteous comment such as “Thanks for all your help on this project.”

You Try It

1. Use a word processor such as Microsoft Office Word to open the file A-1.doc provided with your Data Files, and save it as Meeting.doc in the location where you store your Data Files.
2. Revise the material so it is appropriate for an e-mail message that organizes a meeting.
3. Save and close Meeting.doc, and submit it to your instructor as requested.
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FIGURE A-2: Four basic elements in an e-mail message

Subject line
- Summarizes the main idea of the message
- Don't use vague or wordy language
- Use a brief phrase
- Don't write a complete sentence
- Don't use terms a spam filter might catch

Opening sentence
- Restates the main idea (unless it is bad news)
- Don't start with a topic other than the main topic
- Make your request or respond directly to a question
- Don't explain before making your request
- Don't restate the request in your reply

Message body
- Focus on a single topic
- Don't overwhelm your reader with lengthy narrative
- Organize your supporting ideas logically
- Don't include information that doesn't relate to your main topic
- Use short sentences, headings, and lists
- Don't include information that doesn't relate to your main topic
- Include attachments for supplemental material

Closing
- Include a call to action when you are making a request
- Don't omit your contact information
- Provide a deadline when appropriate
- Don't close abruptly
- Summarize long messages or end with a closing thought
- Don't close abruptly

TABLE A-2: Basic e-mail elements do's and don'ts

<table>
<thead>
<tr>
<th>element</th>
<th>do</th>
<th>don't</th>
</tr>
</thead>
<tbody>
<tr>
<td>Subject line</td>
<td>• Summarize the main idea of the message</td>
<td>• Don't use vague or wordy language</td>
</tr>
<tr>
<td></td>
<td>• Use a brief phrase</td>
<td>• Don't write a complete sentence</td>
</tr>
<tr>
<td></td>
<td>• Don't use terms a spam filter might catch</td>
<td>• Don't use terms a spam filter might catch</td>
</tr>
<tr>
<td>Opening</td>
<td>• Restate the main idea (unless it is bad news)</td>
<td>• Don't start with a topic other than the main topic</td>
</tr>
<tr>
<td></td>
<td>• Make your request or respond directly to a question</td>
<td>• Don't explain before making your request</td>
</tr>
<tr>
<td></td>
<td>• Don't restate the request in your reply</td>
<td>• Don't restate the request in your reply</td>
</tr>
<tr>
<td>Message body</td>
<td>• Focus on a single topic</td>
<td>• Don't overwhelm your reader with lengthy narrative</td>
</tr>
<tr>
<td></td>
<td>• Organize your supporting ideas logically</td>
<td>• Don't include information that doesn't relate to your main topic</td>
</tr>
<tr>
<td></td>
<td>• Use short sentences, headings, and lists</td>
<td>• Don't include information that doesn't relate to your main topic</td>
</tr>
<tr>
<td></td>
<td>• Include attachments for supplemental material</td>
<td></td>
</tr>
<tr>
<td>Closing</td>
<td>• Include a call to action when you are making a request</td>
<td>• Don't omit your contact information</td>
</tr>
<tr>
<td></td>
<td>• Provide a deadline when appropriate</td>
<td>• Don't close abruptly</td>
</tr>
<tr>
<td></td>
<td>• Summarize long messages or end with a closing thought</td>
<td></td>
</tr>
</tbody>
</table>

Making sure your message is delivered

A recent study by Barracuda Networks found that almost 65 percent of e-mail users receive up to 10 unwanted e-mail messages, or spam, per day. In response, organizations and other users install e-mail filters that block messages containing words typically included in spam. To make sure your e-mail messages are not blocked by filters, avoid the following words in your Subject line: Free, Deal, Offer, Buy, Special, Call Now, Click Here, and other terms commonly used to sell products or services, phrases that suggest that the message is urgent or important, and references to money. Also avoid exclamation points, words in all caps, misspelled words, and blank subject lines.
Creating Professional E-Mail Messages

Although e-mail is a relatively new form of business communication, people are beginning to agree on conventions and general guidelines for creating professional e-mail messages. Figure A-3 shows the beginning of an e-mail message that follows these guidelines by including full addresses and a simple salutation. After talking to the tour developers, you are ready to compare Quest tours with Olympus cruises, then suggest a few cruises to offer as tour options. Keisha asks you to send her an e-mail message outlining what you need to complete this task.

1. **Full name and address**
   E-mail addresses such as bal1966@mymail.com don’t clearly identify the sender. Instead, include full names and e-mail addresses in the To and From fields of an e-mail message. E-mail programs such as Microsoft Office Outlook let you enter a first and last name followed by the e-mail address (Example: Bob Linden <bal1966@mymail.com>).

2. **Carbon copy (Cc)**
   In addition to the main recipient, you can send copies of the message to other people by including their e-mail addresses in the Cc field. Be sure the people listed in the Cc field are directly involved with the message and will benefit from its information—most people only want to receive e-mail that they need to read.

3. **Salutation**
   Start your message with a simple greeting such as “Greetings,” “Dear Mr. Dawson,” “Hi, Katie,” or “Ron.” The salutation provides a friendly start to your communication and shows where your message begins, which is especially helpful if someone forwards or replies to your e-mail.

4. **Body format and content**
   Format the opening line and the rest of the message so they are easy to read, as described in Table A-3. Focus on a single topic and keep the message brief, no more than 25 lines if possible. Ideally, your readers should not have to scroll the message more than once or twice. If you need to discuss more than one topic, send a separate message for each topic. Figure A-4 shows the opening line and part of the message body for the e-mail message to Keisha.

5. **Closing**
   End with a signature block that includes your name and contact information, such as the name of your organization, address, and your telephone number. Most e-mail programs can insert signature blocks for you.

### YOU TRY IT

1. Open the file A-2.doc provided with your Data Files, save it as Outline.doc, then start your e-mail program, such as Microsoft Office Outlook.
2. Begin to compose a new e-mail message, addressing the message to yourself with a copy to your instructor.
3. Based on the information in Outline.doc, write a subject line and a complete message similar to the excerpt shown in Figure A-4.
4. Close Outline.doc, then send the message.
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Communicating with E-Mail and Memos

**FIGURE A-3: Addressing the e-mail message**

Name and e-mail address
Copies sent to others directly involved with the message
Simple greeting

**FIGURE A-4: Composing the body of the message to Keisha Lane**

Format of the opening and message body makes them easy to read
Message ends with a call to action and deadline

**TABLE A-3: Creating e-mail do's and don'ts**

<table>
<thead>
<tr>
<th>message section</th>
<th>do</th>
<th>don't</th>
</tr>
</thead>
<tbody>
<tr>
<td>To and From lines</td>
<td>Include both a name and e-mail address in each line</td>
<td>Don't rely on your e-mail address as the only way to identify yourself</td>
</tr>
<tr>
<td>Cc line</td>
<td>Send a copy to people directly involved with the message</td>
<td>Don't send blanket copies to people who are not involved with the message</td>
</tr>
<tr>
<td>Salutation</td>
<td>Start with a short greeting</td>
<td>Don't omit the salutation or use one that's too informal unless you are writing to a friend or close colleague</td>
</tr>
</tbody>
</table>
| Body format      | • Use standard capitalization and lowercase characters  
                  | • Insert blank lines and break up text for readability | • Don't use all uppercase or all lowercase text  
                  |   | • Don't include all of the message content in one long paragraph |
| Closing          | • Include a call to action or deadline, if appropriate  
                  | • End with a signature block | • Don't trail off without a conclusion  
                  |   | • Don't forget to provide your contact information |
Constructing Professional Memos

Professionals occasionally use traditional hard copy memos to deliver information within their organizations, though memos are not as common as e-mail messages. Write a memo when you need a formal or written, formatted record of your communication. Unlike e-mail, you should only send memos to others within your organization. Table A-4 lists the do’s and don’ts for constructing professional memos.

You selected three Olympus cruises that complement Quest tours and want to propose offering the cruises next spring. To prepare for a meeting with Keisha Lane and Ron Dawson, vice president of marketing, you describe the cruises and your recommendations in a memo.

1. **Use a printed form or include a title**
   If your organization provides printed forms or electronic templates for memos, use them to be consistent with others. Otherwise, you can add a title such as “Memo” or “Memorandum” to the top of the page. Figure A-5 shows the memo to Keisha and Ron written on a company form.

2. **Include a standard header**
   The memo header lists basic information about the document. Most memo headers include at least four lines, similar to an e-mail message: Date, To, From, and Subject (or Re). Some organizations specify additional lines, such as Priority or Routing. Use formatting tools in your word-processing program to align the header labels in one column and the corresponding text in another column.

3. **Spell out the date**
   Date formats vary depending on location. For example, 3/4/11 is March 4, 2011, in the United States, but April 3, 2011, in many other countries. To avoid possible confusion, spell out the month name and include a 4-digit year.

4. **Address your reader by name or title**
   You can address your memo to a single person or to a group of people. If you are sending the memo to only a few people, list their names in the To line. Otherwise, use job titles or a group description, such as “Quest tour developers” or “All employees.”

5. **Omit the salutation and signature**
   Instead of starting a traditional memo with a salutation (as in an e-mail message), sign your initials to the right of your name in the From line of the header. This indicates that you’ve reviewed the memo and take responsibility for its content. You don’t need to end a memo with a complimentary closing or signature.

**YOU TRY IT**

1. Open the file A-3.doc provided with your Data Files and save it as Memo.doc in the location where you store your Data Files
2. You are sending the memo to your instructor from yourself on today’s date
3. Add the other missing information using Figure A-5 as your guide
4. Save then close Memo.doc, and submit it to your instructor as requested
Written Communication

Communicating with E-Mail and Memos

Advancing your career by mastering memos

Mastering the art of writing memos can be vital for advancing your career, especially in the corporate world. Communication skills and a strong work ethic are the top traits that recruiting companies look for in job candidates, according to the National Association of Colleges & Employers 2008 Job Outlook. Even technical companies specializing in engineering and computer technology emphasize writing skills. How effectively you communicate your ideas can inform and even inspire others. Bill Gates, cofounder of Microsoft Corporation, wrote a series of memos to colleagues about the potential of computers that set the direction of the computer industry. One laid the groundwork for Microsoft Windows, and another forecast the significance of the Internet. According to Charles Simonyi, a former colleague, Gates “selects the promising ideas that are over the horizon but not too far over, studies them in great detail, and then communicates them very effectively to the company, but also to the industry.”


Written Communication

FIGURE A-5: Quest meeting memo on a company form

Address readers by name

Message header

To: Keiths Lane, Ron Dawson
From: Marianne Durand
Date: April 25, 2011
Re: Summary of Olympus cruises

As you requested, I reviewed the cruises that Olympus Cruise Lines offers and compared them to Quest tours. I looked for cruises that complement our current tours and found at least one per region. Our goal is to select three cruise and tour pairs.

Suggested Tours and Cruises

The following table summarizes the tour and cruise information for each region:

<table>
<thead>
<tr>
<th>Region</th>
<th>Tour Developer</th>
<th>Cruise</th>
</tr>
</thead>
<tbody>
<tr>
<td>Africa</td>
<td>Gulf Queen</td>
<td>Eastern Africa and the Seychelles</td>
</tr>
<tr>
<td>Asia</td>
<td>Win Hoppergath</td>
<td>Day of Bengal</td>
</tr>
<tr>
<td>Australia</td>
<td>Nancy McDonald</td>
<td>Australia and New Zealand</td>
</tr>
<tr>
<td>Europe</td>
<td>Ellen Lahey</td>
<td>Mediterranean</td>
</tr>
<tr>
<td>Latin America</td>
<td>Derek Ojado</td>
<td>Galapagos Islands</td>
</tr>
<tr>
<td>North America</td>
<td>Derek Ojado</td>
<td>Alaska</td>
</tr>
</tbody>
</table>

We can discuss these recommendations when we meet Thursday, April 28.

TABLE A-4: Constructing memos do’s and don’ts

<table>
<thead>
<tr>
<th>memo element</th>
<th>do</th>
<th>don’t</th>
</tr>
</thead>
<tbody>
<tr>
<td>Header</td>
<td>Include standard header lines formatted in two columns</td>
<td>Don’t omit the header labels</td>
</tr>
<tr>
<td>From line</td>
<td>Sign your initials after your name in the From line</td>
<td>Don’t sign your name at the end of the memo</td>
</tr>
<tr>
<td>Opening line</td>
<td>Start with your main idea or request</td>
<td>Don’t start with a salutation</td>
</tr>
<tr>
<td>Body format</td>
<td>• Single-space the text</td>
<td>• Don’t double-space the text</td>
</tr>
<tr>
<td></td>
<td>• Insert blank lines between paragraphs</td>
<td>• Don’t fill the page with one long paragraph</td>
</tr>
<tr>
<td></td>
<td>• Use headings, lists, and bold to highlight information</td>
<td></td>
</tr>
</tbody>
</table>

PROPERTY OF CENGAGE LEARNING

NOT FOR REPRODUCTION
Writing Request Messages

A request message asks for information or action from someone else. For example, write a request message when you need to ask colleagues if they are available for a meeting, have information they could send you, or are finished with their tasks on a project. Figure A-6 shows an original and revised version of a typical request message. Keisha and Ron approved your plan to add three cruises as extended tour options. They suggest you send e-mail messages to the tour developers asking them to propose specific tours that would work well with the cruises you selected.

1. Take a direct approach
   Start your message by directly making your request. Avoid excessive detail or explanation. For example, “Are you free on Tuesday for a planning meeting?” makes the request in the first line. If you have more than one question, start with a brief statement such as “Please answer the following questions regarding the new project,” then list your questions.

2. Include a brief explanation
   Your readers ask questions as they read your request. Why are you asking me? What sales figures do you need? Where is the meeting and how long will it last? Anticipate questions and offer short explanations. People are more willing to help and respond quickly when they understand the reasons for a request.

3. Organize the details
   Use bulleted or numbered lists to clearly present your questions, the details of your request, or the specific actions you want your readers to take. Don’t make your reader search through long paragraphs to figure out what you are requesting.

4. Include a deadline
   Deadlines help your readers determine the priority of your message and work your request into their schedules. Be sure the deadline is realistic. If you are requesting immediate action or significant effort, make a phone call or a personal visit instead. Figure A-7 shows a request message that includes a deadline.

5. Use basic courtesy
   Because a request message asks your reader to do something for you, use a polite, friendly tone and express appreciation for their efforts. For example, phrases such as “Please consider the following questions,” or “I would appreciate your response by…” are courteous sentence openers.

YOU TRY IT

1. Open the file A-4.doc provided with your Data Files, save it as Request.doc, then start your e-mail program, such as Microsoft Office Outlook
2. Based on the rough draft of the message in Request.doc and in Figure A-7, compose an e-mail message requesting information from the Quest tour developers
3. Close Request.doc, then send the message to yourself with a copy to your instructor

Simplifying meeting requests

Many organizations, especially those that have offices in more than one place, use e-mail to set up online meetings and request attendance. However, employees often have trouble scheduling and preparing for meetings when they use e-mail alone to send messages requesting meetings. Integrating e-mail software with meeting software solves this problem. For example, you can schedule a Web conference using Microsoft Office Outlook, then send a meeting request to participants along with documents they need for the meeting. Instead of composing a separate message, recipients can respond to the request by clicking a button. When it is time for the meeting, participants can click a link in the meeting request message to connect to the online Web conference.
**FIGURE A-6: Original and revised written request**

Original request message:

Local hotels can give you bids for our upcoming sales meeting. We need a meeting location near downtown, catering for all of the participants, ground transportation, and hotel rooms. Let’s assume that 100 people will attend. We need to serve breakfast and lunch. We also need to provide coffee service throughout the day. People will arrive at different times, so find the transportation cost on a per-person basis. The participants probably want their own hotel rooms.

Revised request message:

To prepare for the upcoming sales meeting, please contact local hotels and solicit bids for the following:

- Meeting venues (downtown area, seating for 100+ people)
- Hotel rooms (near the meeting, single occupancy)
- Ground transportation (per-person, between the airport and hotel)
- Catering (breakfast, lunch, and ongoing coffee service)

Please send me the bids by Wednesday, March 17. Thank you for your help.

**FIGURE A-7: Request message to Quest tour developers**

As we discussed during our recent conference call, please prepare a proposal to include one or more of the Olympus cruise ships in your tour packages. We will select three tour and cruise pairs to add to our packages. Include the following information in your proposals:

- Name and location of the Quest tour
- Name and home port of the Olympus cruise
- Itinerary of the tour and cruise

Takes a direct approach
Provides a brief explanation
Organizes details
Closing includes a deadline
Written Response Messages

After receiving a request message from someone, you need to send a response to that request and answer any questions. In fact, much of your professional e-mail communication will probably involve creating response messages. As in other types of e-mail messages, you should take a direct approach, format for readability, and use professional, courteous language. Because you are replying to a request, your message should stick to the topic introduced in the original message, and organize your answers or other responses logically and concisely. Figure A-8 shows an original and revised response message. Derek Opazo, the tour developer for the Americas, sent you an e-mail message with questions about the cruises that might fit his tours. You need to reply with responses to his questions.

1. **Use the original subject line**
   When you use the Reply feature in your e-mail program, the program usually inserts “Re:” at the beginning of the Subject line, then inserts the original subject text. The “Re:” indicates your message is a reply, which helps recipients track related messages. If the original subject text is missing or weak, such as “Request,” replace it with a more detailed subject, such as “Re: Your request for travel expenses.”

2. **Maintain a direct approach**
   When writing a response, you don’t need to restate or summarize the original message. Instead, start by directly responding to your reader’s initial questions or request. If possible, respond with positive language to generate goodwill and enhance your image as cooperative and helpful. For example, “I am happy to assist you with…” and “As you requested, here are the answers to your questions about…” are effective response-message openers.

3. **Respond completely and in the manner of the original request**
   Make sure you answer all the questions or provide all the requested information. Otherwise, your colleague might need to send you a follow-up message highlighting the missing responses. Your reply should also be consistent with the original request. For example, answer questions or address multiple requests in the same order as in the original request. Most e-mail programs let you include the text of the original message with your response, which helps your readers understand your responses in context. See Figure A-9.

4. **Prune the reply**
   If you include the text of the original message, you can delete the header, greeting, closing, and signature block so readers can focus on the response sections of your message. You can also insert your responses directly after each question in the original message—some e-mail programs insert your initials before these responses or display them in a contrasting color.

**YOU TRY IT**

1. Open the file A-5.doc provided with your Data Files, save it as Response.doc, then start your e-mail program, such as Microsoft Office Outlook
2. Analyze the request, then plan your response
3. Use your e-mail program to write a response message that follows the recommended guidelines, similar to the message shown in Figure A-9
4. Close Response.doc, then send the message to yourself with a copy to your instructor
Response e-mail etiquette

According to the Web site emailreplies.com, e-mail responses should be governed by common rules of e-mail etiquette, particularly in the business world. Following e-mail etiquette helps to convey a professional image, ensure efficient and accurate responses, and prevent misunderstandings and even legal problems. Many etiquette guidelines address e-mail responses in particular. For example, when writing and sending e-mail responses, be sure to answer all the questions in the request message, anticipate related questions, respond as quickly as possible (within at least 24 hours), and use the Reply to All feature sparingly. As in any type of e-mail, proofread your complete message before you send it, and look for language your reader might misinterpret. Because e-mail is nearly instantaneous, people expect rapid responses to their requests or by their stated deadline. Responding promptly is professional and courteous. If you don’t have an immediate answer to a question, send an e-mail explaining that and identifying when your recipient can expect a response. If you are tardy in your response or fail to respond at all, you can create the impression that you are avoiding the sender’s request or have poor time-management skills.
Writing Bad-News Messages

Occasionally, you need to write a bad-news message to refuse a request, decline a proposal, highlight disappointing sales, or cancel a project. If your reader does not have a personal stake in the bad news, you can use the direct approach in your message. On the other hand, if your reader is likely to be disappointed, take an indirect approach to the bad news, which reveals the message in stages. Figure A-10 shows the original and revised versions of a bad-news memo. After the Quest tour developers sent you proposals for including Olympus cruises with their tours, you and Keisha selected three tours that will include a cruise option. You now need to write an e-mail message to the developers of the tours you did not select.

1. **Start with a statement that establishes goodwill**
   Open with a sincere observation, compliment, or encouraging comment related to your subject. For example, acknowledge your reader’s achievement or contribution in a statement such as “Thank you for your detailed, thoughtful request for additional funding.” You can also start with facts related to the news, as in “This year, transportation costs have doubled.”

2. **Explain the background**
   Presenting the reasons for the negative message is especially important. Briefly describe the circumstances that are relevant to the bad news. Providing some context helps your reader understand the situation and the response. Figure A-11 shows the beginning of a bad-news message that explains the background of the decision.

3. **Deliver the bad news**
   State the bad news objectively and professionally, using language that softens the message. Provide an alternative or compromise, if possible. For example, you might write, “As a result of increased production, no vacation requests are being honored until after September 1. If you resubmit the request in the fall, I will process it for you immediately.”

4. **Close the message appropriately**
   Cushion the bad news by ending with an optimistic statement, or mentioning good wishes. To convey a firm and decisive tone, conclude with the bad news.

5. **Proofread carefully before sending**
   In addition to checking your spelling and grammar, consider how your readers might react to and interpret your message. Refer to Table A-5 as you edit the message for a list of do’s and don’ts when creating bad-news memos.

YOU TRY IT

1. Open the file A-6.doc provided with your Data Files, save it as BadNews.doc, then start your e-mail program, such as Microsoft Office Outlook
2. Review the message in the document, which takes a direct approach
3. Use your e-mail program to write a bad-news message that uses an indirect approach similar to the excerpt shown in Figure A-11
4. Close BadNews.doc, then send the message to yourself with a copy to your instructor
FIGURE A-10: Original and revised version of bad-news message

Original bad-news message

Your request to attend the trade show in Orlando has been denied. You should know that the department is cutting back on all travel requests.

As the lead for this important project, you would certainly benefit from attending the trade show. Those in upper management take a different view. I realize you deserve much greater appreciation for your efforts.

Next spring starts a new budgeting cycle. If you send me any requests after March 1, I will personally make sure that it is approved.

Revised bad-news message

All of us in the technology department appreciate your efforts on the network project. I can understand why you’d like to attend the Network Security show in Orlando from October 2-5.

Unfortunately, the technology department is over budget and is no longer approving travel requests. I realize this is disappointing, but I cannot approve your request this year.

However, when we receive a new budget in the spring, I would be happy to approve professional travel for you similar to the trade show. For example, the Secure Communications conference is scheduled for March 4 and year in Las Vegas. If you are interested in attending, let me know shortly after March 1.

TABLE A-5: Delivering bad news do’s and don’ts

<table>
<thead>
<tr>
<th>message element</th>
<th>do</th>
<th>don’t</th>
</tr>
</thead>
<tbody>
<tr>
<td>Opening line</td>
<td>Express appreciation, agreement, or understanding as appropriate</td>
<td>Don’t use trite or insincere language</td>
</tr>
</tbody>
</table>
| Background explanation | • Explain the reasons for the bad news using neutral language  
• Demonstrate that you respect the reader | • Don’t reveal confidential reasons or express opinions  
• Don’t blame or accuse the reader of causing a problem |
| Bad news        | • Use clear, neutral language to deliver the bad news  
• Cite any benefits in the decision  
• Suggest a compromise or alternative | • Don’t make unrealistic claims or sound impersonal  
• Don’t show benefits if they seem insincere  
• Don’t make promises that are difficult to keep |
| Closing         | • End on a positive note  
• If you need to be firm, end with the bad news | • Don’t use canned or impersonal language  
• Don’t invite further communication |
Writing Documentation Messages

A documentation message, also called a confirmation, to-file, or incident message, confirms events, ideas, discussions, agreements, changes, or instructions. It provides a reminder of an upcoming task or restates an earlier message to avoid misunderstanding. Documentation messages can also provide concise records that might be helpful in the future, especially to settle disagreements.

Now that you’ve selected three tours that will include a new cruise option, the tour developers need to add the cruise information to the company Web site and tour catalog. You decide to send them a message documenting their next steps.

1. Use a direct approach and professional tone
Because readers often refer back to documentation messages, focus on the most important issues and organize the information logically. For example, use a numbered list to describe a procedure. Use a bulleted list to confirm the main points of a discussion or decision. Figure A-12 shows the draft of a documentation message that does not take a direct, professional approach. Figure A-13 shows a revision of the same message that documents a procedure effectively.

2. Ask for feedback
To make sure your readers understand and agree with the message, ask them to send you questions or to note any inaccuracies or disagreements. Your readers often need to clarify or add to the original message so that it accurately and completely reflects the event it documents.

3. Keep it brief and objective
If you are simply acknowledging a change in schedule or verifying that you received a document, create a brief e-mail message with a short confirmation statement. If the message documents sensitive information, such as an agreement to delay a report, use objective, not accusatory language.

4. Save a copy of the message
When sending a documentation message or memo about an important matter, print a hard copy of the message and save it in a file or other appropriate location. Documentation messages sometimes need to be retrieved quickly.

You Try It

1. Open the file A-7.doc provided with your Data Files, save it as Documentation.doc, then start your e-mail program, such as Microsoft Office Outlook
2. Review the information in the document, which is a rough draft of a documentation message
3. Use your e-mail program to write a documentation message similar to the one shown in Figure A-13
4. Close Documentation.doc, then send the message to yourself with a copy to your instructor
Communicating with E-Mail and Memos

**Avoiding e-mail overload**

In the corporate world, e-mail overload is a bigger problem than spam. In 2008, the average e-mail user in an organization received about 125 messages a day, which is a 55 percent increase from 2003. Much of this e-mail comes from colleagues, especially those who click the Reply to All button when replying to most messages, send documentation messages to a large group, or send many reminder messages for minor events such as verifying attendance at a regular staff meeting. Some new software products work with e-mail programs to help you reduce the amount of e-mail you send. One product asks you to assign a value to each message sent. For example, you might assign three points to a message asking a colleague to join you for lunch and 30 points to your manager requesting help for an urgent problem. When you meet your point quota for the week, you need to evaluate any other messages you want to send. Another product lets you manage e-mail you receive by color-coding messages from certain users. For example, you might assign green to messages from your manager and blue to messages from a colleague. That way, you know you should open the green messages immediately. Some software even color-codes e-mail automatically by analyzing messages and determining whether the sender is listed in your electronic contacts list.

A wiki is a Web site that many users can contribute to by creating and editing the content. When you are collaborating with colleagues on a project, a wiki can be a more effective communication tool than e-mail. With e-mail, encouraging ideas, making suggestions, and then reaching a consensus can quickly lead to e-mail overload. Because each e-mail message is a separate unit, it is difficult to track conversations and maintain records of decisions, even when using the Reply to All feature. A wiki solves these problems by providing a central location for group editing and quick collaboration. Table A-6 identifies when to use a wiki. You’ve heard that wikis are more effective than e-mail when communicating within a group, and Keisha Lane encourages you to learn more about wikis for Quest Specialty Travel.

1. Collaborate on projects
A wiki is a Web site designed for collaboration. If you have access to the wiki, you can visit the Web site, review the latest content, and then update its pages in a Web browser, such as Microsoft Internet Explorer or Mozilla Firefox.

The most well-known wiki is Wikipedia, shown in Figure A-14, which is an online encyclopedia that anyone with a Web browser can contribute to and maintain. If one Wikipedia user makes an incorrect or inappropriate entry, another user can edit it. Because thousands of users contribute to the wiki, it is a well-researched, high-quality resource.

2. Manage information
You can include all types of business documents on a wiki, such as spreadsheets, text files, presentations, and photos. If you want others to contribute or make changes to the document, you can let anyone in your organization or department access it. Otherwise, you can let only certain users edit the document, while others can view it. If someone does edit a wiki document, the wiki automatically creates a record of who made those changes and when so that you can revert to an earlier version of the document if necessary.

3. Set it up for easy navigation
If you are creating a wiki, start by creating a home page on your computer. In the same folder as the home page, store the documents you want to share with others. For example, one document might be “ToDo Today.” Others might be “AllTasks” and “CustomerList.” On the home page, list links to these documents.

Use wiki software to create user accounts, which is where you indicate who can access the wiki and what they can do. The rule of thumb for wikis in organizations is to share as much information as possible and secure only what must be private.

4. Access it frequently
If you are using a wiki for a project, access the home page frequently. Check the to-do list or recently modified documents so you can see what needs to be completed on your project. If you edit a document, look for a Summary text box where you can enter a note describing your changes. Then save your changes. The wiki usually updates the list of recent changes.

1. Open a Web browser such as Microsoft Internet Explorer or Mozilla Firefox, and go to http://softskills.wikidot.com/
2. Click the Ideal Tour link in the navigation bar on the left, and then click the Edit link at the bottom of the page
3. Follow the instructions on the page to add a description of your ideal place to travel and explain why Quest should add a tour to this place
4. Click the Save link to save your changes
FIGURE A-14: Wikipedia, the most well-known wiki

Click for a tutorial on editing Wikipedia entries

TABLE A-6: Appropriate uses for wikis

<table>
<thead>
<tr>
<th>scenario</th>
<th>use wiki</th>
<th>use e-mail</th>
<th>use other</th>
</tr>
</thead>
<tbody>
<tr>
<td>Everyone on your project team needs to share a common set of documents</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>You want to organize meeting notes and team calendars</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>You are working with colleagues in different locations around the world</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>You need to make sure you are working with the latest budgets and schedules for your project</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Your organization wants everyone to access information about company procedures</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>No one on your team knows how to set standards for naming wiki pages or maintaining links</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>You need to exchange confidential documents that are not suitable for peer review</td>
<td></td>
<td></td>
<td>Secure Web site</td>
</tr>
<tr>
<td>You want to express opinions</td>
<td></td>
<td></td>
<td>Blog</td>
</tr>
</tbody>
</table>
Practice

**SOFT SKILLS REVIEW**

Understand e-mail messages and memos.

1. **In which one of the following scenarios should you write a memo instead of an e-mail message?**
   a. You are inviting people to a meeting
   b. You are telling many colleagues that a presentation is cancelled
   c. You need a hard copy record of a revised policy
   d. You are responding to a brief question

2. **What should you do before writing an e-mail message or memo?**
   a. Identify the purpose and audience
   b. Send a test message to a colleague
   c. Wait until you have strong feelings about the subject
   d. Make sure your reader is near a computer

Compose the main elements of messages.

1. **Which one of the following is not a main element of messages?**
   a. Subject line
   b. Bcc line
   c. Opening sentence
   d. Message body

2. **Which one of the following is an effective subject for a message?**
   a. Questions
   b. Re: Re:
   c. This is a confidential message
   d. Meeting on Friday at 9:00 am

Create professional e-mail messages.

1. **Who should you include in the Cc field of an e-mail message?**
   a. Anyone listed in the original message
   b. Only people directly involved with the message
   c. Your manager in all circumstances
   d. No one

2. **Which of the following is an appropriate way to end an e-mail message?**
   a. Summary of the main idea
   b. Short greeting
   c. Call to action or deadline
   d. Bulleted list of questions

Construct professional memos.

1. **Which of the following is not part of a standard memo?**
   a. Header
   b. Salutation
   c. Subject line
   d. Names of recipients

2. **Unlike e-mail, you should send memos only to:**
   a. customers or clients
   b. people who don’t like email
   c. managers or supervisors
   d. others in your organization

Write request messages.

1. **What is the purpose of a request message?**
   a. To answer a question
   b. To ask for information or action
   c. To avoid personal contact
   d. To deny a request

2. **What is an effective way to start a request message?**
   a. Make a direct request
   b. Make an apology
   c. Soften the message with a greeting
   d. Include a call to action
Write response messages.

1. **What is a good practice when writing response messages?**
   - a. Always use the Reply to All feature
   - b. Insert your initials next to your name
   - c. Be sure to add your manager’s name to the Cc line
   - d. Use the Reply feature to include the original subject

2. **What kind of message should you send if you cannot comply with a request?**
   - a. Bad-news message
   - b. To-file message
   - c. Secondary request message
   - d. Confirmation message

Write bad-news messages.

1. **Which of the following should you avoid when writing bad-news messages?**
   - a. Providing reasons for the bad news
   - b. Suggesting an alternative
   - c. Expressing an opinion
   - d. Using neutral language

2. **Which is the most important part of a bad-news message?**
   - a. Using a concise subject
   - b. Presenting the reasons for the bad news
   - c. Ending with a firm, decisive tone
   - d. Listing questions about a request

Write documentation messages.

1. **What is the purpose of a documentation message?**
   - a. Persuade your readers
   - b. Confirm events, discussions, or agreements
   - c. Answer computer questions
   - d. Convey cheer and optimism

2. **Which of the following should not be part of a documentation message?**
   - a. Request for feedback
   - b. Direct approach
   - c. Confidential information
   - d. Short confirmation statement

Technology@work: wikis.

1. **What is a wiki?**
   - a. Audio file you can download
   - b. Web site that allows user collaboration
   - c. Web log that allows journal entries
   - d. Web conference

2. **Which of the following is not a scenario for using a wiki?**
   - a. You are exchanging confidential documents, not appropriate for peer review
   - b. Your project team wants to use a central to-do list
   - c. You are working with colleagues in different countries
   - d. You need to manage a common set of documents
\textbf{CRITICAL THINKING QUESTIONS}

1. “When you click the Send button in your e-mail program, assume that your e-mail message has been published.” What implications does this statement have when you compose an e-mail message?

2. Suppose you are writing an e-mail message requesting that a colleague attend a meeting. What kind of language and tone do you use? Does the language and tone change if you are writing to a manager in your organization? To a client or customer? To someone in another country? If so, explain how your message changes in each case.

3. Because company computers are meant for work-related tasks, employers can legally track your computer usage and monitor your e-mail. Do you consider e-mail monitoring an ethical practice? If you owned your own business, would you monitor your employees’ e-mail messages?

4. Before e-mail became popular, you corresponded with people outside of your organization using a formal business letter. Although e-mail is now the preferred approach, when would it still be more appropriate to send a formal letter?

5. When you send a message to other people, how strictly do you think they judge you on your communication abilities? How does this affect your writing?
INDEPENDENT CHALLENGE 1

You work in the Marketing Department of a small Web design company named Overland Designs. The company has grown significantly in the past year. Marshall Aronson, the director of marketing, wants to organize a company celebration to thank employees, honor special accomplishments, and reinforce teamwork. Marshall has made some notes about the celebration, shown in Figure A-15. He asks you to use the notes to send an e-mail to other department directors requesting their help in organizing the celebration.

a. Use a word processor such as Microsoft Office Word to open the file A-8.doc provided with your Data Files, and save it as Celebration.doc in the location where you store your Data Files. Review the contents of the document, then start your e-mail program.
b. Start a new e-mail message, and enter the message header based on the information in the Celebration document.
c. Include a clear, meaningful subject.
d. Write an opening sentence that reveals the main idea of the message.
e. Write a message body that supports your main idea based on the information in the Celebration document. Organize the material logically. Use lists and graphic highlighting techniques to make the message body easy to read.
f. End the message with an appropriate closing statement.
g. Proofread the document carefully to fix any grammar or formatting errors.
h. Close Celebration.doc then send the message to yourself with a copy to your instructor.

FIGURE A-15

Overland Designs Company Celebration

- Thank employees
- Honor special accomplishments
- Reinforce teamwork
- Send e-mail message to Carl Lansing, Jay Willbourn, Lindsey Rhodes, and Tammy Mitchell. Request their help in organizing the celebration.
- Possible areas of help: sending invitations, designing awards for special accomplishments, developing a (short) process for nominating employees for special accomplishments, enlisting speakers, organizing time, place, and type of celebration—appetizers only? dinner? luncheon?
INDEPENDENT CHALLENGE 2

You are the manager of the flagship Four Winds Apparel store in Minneapolis, Minnesota. Four Winds Apparel specializes in affordable active wear for men, women, and children and has five other stores in the Minneapolis-St. Paul area. After a year of disappointing sales, Four Winds has decided to close two stores in the twin cities. Allison Crandall, the Four Winds regional manager, sends you a memo explaining this decision and asking you to inform the managers of the stores that will close. You need to revise the memo and send it to the store managers.

a. Use a word processor such as Microsoft Office Word to open the file A-9.doc provided with your Data Files, and save it as Store Memo.doc in the location where you store your Data Files.

b. Review the Store Memo document, noting the information that seems inappropriate for the store managers. Insert a suitable header for the memo that includes To, From, Date, and Subject fields. Assume that the managers don’t know you personally.

c. Revise the body of the memo so that it uses an indirect approach to deliver the bad news about the store closings.

d. Include a closing statement that is optimistic and creates a sense of goodwill.

e. Proofread the document carefully to fix any grammar or formatting errors.

f. Close StoreMemo.doc then provide it to your instructor.

REAL LIFE INDEPENDENT CHALLENGE

This Independent Challenge requires an Internet connection.

You are applying for a summer internship in Washington, D.C., and need to send an e-mail message to a program coordinator to learn the details of the internship.

a. Using your favorite search engine, search for internship programs in Washington, D.C., such as those in government, media, communications, or the arts. Figure A-16 shows a few possibilities. Select an internship that appeals to you. Note the address of the Web site that describes the internship.

b. Use your e-mail program to create an e-mail message requesting more information about the internship. Paste a copy of the internship Web site address into the message.
c. Make sure the message includes the following elements:
   • Clear, meaningful subject
   • Effective opening sentence
   • Well-organized message body
   • Appealing formatting
   • Appropriate closing statement

d. Proofread the message carefully to fix any grammar or formatting errors.
e. Send the message to yourself with a copy to your instructor.

▼ TEAM CHALLENGE

This Independent Challenge requires an Internet connection.

You work for Farley Worldwide, a company specializing in information services, and have been promoted recently. You now travel overseas with a small group and help your client companies install computers and software. Your next trip is to Beijing, China. Connie Lerner, your project head, will be traveling with you, and mentions she has heard that traveling to China can be quite a culture shock. You and your team need to research how to prepare for the trip to minimize the culture shock.

a. Using your favorite search engine, search for information about westerners in Beijing and tips on doing business there. Note the addresses of the Web sites that provide the most useful information.

b. Meet as a team to discuss your findings.

c. As a team, outline an e-mail to Connie Lerner explaining what to expect in Beijing.

d. Individually, write an e-mail explaining how to prepare for the Beijing trip.

e. Send the message to yourself with a copy to your instructor.
BE THE CRITIC

Review the poorly written message shown in Figure A-17. Create an e-mail message that lists the weaknesses of the message and makes specific suggestions for improvement. Send the critique to your instructor.

FIGURE A-17

As you have probably heard through the grapevine, lots of changes are planned for the upcoming sales season. As you already know, one of these changes is making presentations. According to your job description, you are assigned the presentation of the Recreation products. You will be speaking with Jasmine Martinez, so coordinate with her. The last presentation is scheduled for 3:00 pm—the Recreation presentation is slotted to be given right before that. In addition, you must submit your presentation for review by the sales manager. Check with him about the deadline.

One suggestion is to show the new products in the Recreation line. The best way to go is probably to start with your usual presentation and then augment that.

Thank you for your attention to this matter.