

BUSINESS WRITING SKILLS

Planning Worksheet

THREE STEPS TO PLANNING ANY DOCUMENT IN 10 MINUTES

- **COMPLAINT RESPONSE**
- **POLITE REQUEST**
- **PROPOSAL**
- **PROCEDURE**

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The Planning Worksheet is provided as a general guide only and does not claim to be legal advice. Users should seek legal advice in relation to particular legal issues arising from their writing.



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Chapter 1: Planning using the Planning Worksheet

A step by step approach to planning in 10 minutes

Planning helps you to decide what you want to say and how to say it.

BENEFITS OF A WELL PLANNED DOCUMENT

If a document is planned, there is an increased likelihood that:

- all relevant information will be included,
- the order will be logical and the message will flow,
- information will not be repeated unnecessarily and
- the document will achieve its purpose.

Planning does not have to waste time. In fact, if you have a set method to plan, it can actually save you time. The BWS Planning Worksheet has been designed to help you plan your documents. The three elements of the BWS Planning Worksheet are as follows.

- The communication purpose
- The audience or reader/s
- The data

PLANNING YOUR DOCUMENTS

Planning should begin *before* you investigate or conduct any research. When you plan your document, you don't have all the details or information you would need to begin writing the document.

THE COMMUNICATION PURPOSE

You need to let your readers know up front in the document why you are writing. It is best to do so in a descriptive subject heading (title) *and* in the first paragraph of your document's introduction.

If your readers have to read the first paragraph a second time to work out why you are writing the document, they may lose interest and you have failed in one of the most important elements of effective writing.

Deciding on the document theme

To find your document's purpose, you first need to know what your document's *theme* is. Generally speaking there are four main *themes* a document can have.

The document theme can be to:

- **direct** (or instruct);
- **request**;
- **recommend** (or justify, propose, resolve, persuade, evaluate or dispute); or
- **report** (or inform, update, present, explain, communicate, define, respond, clarify, advise, explore, complain, apologise or give bad news).

The section of the BWS Planning Worksheet that relates to the document's theme looks as follows.

1. WHAT IS THE COMMUNICATION PURPOSE OR REASON FOR WRITING?

DECIDE ON THE DOCUMENT THEME

Direct
(or
instruct)

Request

*Recommend (or justify, propose,
resolve, persuade, evaluate or
dispute)*

*Report (or inform, update, present,
explain, define, communicate,
respond, clarify, advise, explore,
complain, apologise or give bad
news)*

Working example: The complaint

You are Amy Lane, a Customer Service Representative at the ABC Courier Company. A client, Mr Cross, has written a letter of complaint to you.

You need to *plan a written response to the letter below*.

I M Cross
Widgets Galore
Phone/Fax 9828 6745

22 Jan
ABC Courier Company

Dear Ms Lane

On 6 JAN I had an urgent requirement for product that was dispatched by your company for next day delivery containing urgently required Widgets of which only arrived today 22nd Jan. I today rang ABC and was told they had tried to phone us on the 9th 10th 11th JAN. We did not receive any calls from ABC but this phone was attended at those times. In fact it is attended 24 hours a day. I am very disappointed at this delay as it has severely inconvenienced us also causing some embarrassment.

We have used ABC on numerous occasions and have always been happy with the service. I just hope this does not happen again as you are aware that fixing mistakes is expensive and I feel the money in this case has been wasted and has held up a very important and lucrative client. I was also told by ABC staff a letter was sent to us on the 12th but this was never received. Your urgent attention would be appreciated. What happened?

Yours faithfully IM CROSS

You can now decide on the appropriate theme. Is the document's theme going to be to:

- direct someone to do something? NO
- request something be done? NO
- recommend a course of action? NO
- respond to a complaint? YES

1. WHAT IS THE COMMUNICATION PURPOSE OR REASON FOR WRITING?

DECIDE ON THE DOCUMENT THEME

Direct
(or
instruct)

Request

*Recommend (or justify,
propose, resolve,
persuade, evaluate,
dispute)*

*Report (or in
explain, d
respond, clarify, advise, explore,
complain, apologise or give bad
news)*

Respond

Your document's theme is to *respond to the complaint*.

Writing the communication purpose statement

Knowing clearly what your theme is will help you write the document's communication purpose statement. The reason for writing the document is the communication purpose. To find the purpose, complete the following statement.

'The reason for writing the document is to _____'.

EXAMPLES OF COMMUNICATION PURPOSE STATEMENTS

The reason for writing the document (*or communication purpose*) is to propose (*theme*) a solution to the current resource shortage in the manufacturing division.

The reason for writing the document (*or communication purpose*) is to report (*theme*) on the incident that caused the plant to shut down for 24 hours.

The reason for writing the document (*or communication purpose*) is to request (*theme*) agenda items from the team who will attend the monthly management meeting.

The reason for writing the document (*or communication purpose*) is to apologise (*theme*) for the inconsistent communication and service received from our organisation.

At this stage you don't need to decide what type of document you will write, it is more important to get the theme and the communication purpose statement correct. Whether you will use a letter, email message, fax, memo or report to communicate your message is a decision that you will make after you have planned the document.

Once you have written your communication purpose statement, you may find the sentence sounds harsh, impersonal or just too direct, especially when writing a short document. You may want to change the wording of the statement to improve readability and tone. For example, you could write 'I would like to ...' or 'The purpose of this

report is to ...' instead of 'The reason for writing the document is to ...'. However, don't change the wording until after you have written the entire first draft of your document.

After reading the *communication purpose statement*, ask yourself the following questions.

- Will the reader know why I am writing the document?
- Will the reader clearly see the document's theme?
- Will the reader know what the point of the document is?

After reading the *document*, ask yourself the following questions.

- Does the document do what it said it was going to do in the communication purpose statement?
- Is the communication purpose statement complete or does the document do more than what was stated up front?

Don't forget to refer back to the communication purpose statement when you write your draft. When you have finished writing the document, if your purpose and theme was clear in the introduction, it will be easy to check if the document achieves its purpose.

The section of the BWS Planning Worksheet that relates to the communication purpose statement looks as follows.

1. WHAT IS THE COMMUNICATION PURPOSE OR REASON FOR WRITING?

WRITE THE COMMUNICATION PURPOSE STATEMENT

The reason for writing this document is to:

Examples: The reason for writing this document is to:

- *provide information to relevant parties,*
- *recommend a particular course of action,*
- *propose a solution to a problem,*
- *request the reader answer a question/s,*
- *report on a technical issue,*
- *request the reader follow through some action.*