



## **Business Writing Guide: Reports and Memos**

**Prepared for**

**The MBA Program  
At Franklin University  
Columbus, OH**

**Prepared by**

Brenda L. Jones, Ph.D.  
College of Arts, Sciences and Technology  
Franklin University  
Columbus, OH

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## **The Purpose of These Guidelines**

Writing is a form of self-expression and, as such, varies widely across individuals. Unfortunately, the use of a variety of formats and styles for documents can be confusing and diminish productivity in a professional context. Business writing needs to be functional – concise, clear, and correct. Throughout the Franklin MBA program you will apply these guidelines, which have been developed from American Psychological Association (APA) Publication Manual (2001) and reflect current industry communication practices. The “APA Style and Academic Integrity Guidelines” (2009) provided by the Franklin University Student Learning Center will be referenced in this document to avoid duplication of material.

These guidelines will help reduce ambiguity in assignments, because you can focus on the content of an assignment and feel confident about how to format and present that assignment. The guidelines help the instructors to evaluate your work using a consistent set of expectations, which will be applied in all your MBA classes. Tutors in the university writing center will also follow these guidelines while assisting MBA students. These common guidelines will also facilitate your work on group assignments, which are a hallmark of the MBA program.

## Structure of a Report

Introduction	Body	Conclusion
<p>(The following elements <u>can</u> be used in the introduction section of the report. Organize your report based on its purpose and audience – research reports are organized differently from business plans).</p> <hr/> <ul style="list-style-type: none"> <li>• <b>Purpose</b></li> <li>• <b>Problem/ Issue</b></li> <li>• <b>Scope/Focus of Report</b> (e.g., Is it a financial forecast for the whole company or for a specific division of the company?)</li> <li>• <b>Method/ Sources</b> (e.g., Did you use an existing survey?)</li> <li>• <b>Limitations.</b> (e.g., Perhaps questionnaire completion percentages were low or other company data was not available.</li> <li>• <b>Overview/ Main Points</b></li> </ul>	<p>(The type and organization of information will differ depending on the <i>type</i> of report).</p> <hr/> <p>Presents, analyzes, and interprets the information gathered during your investigation and supports your recommendations or conclusions.</p> <p><b><u>Topics Commonly Covered in the Body</u></b></p> <ul style="list-style-type: none"> <li>• <b>Explanation of problem or opportunity.</b></li> <li>• <b>Facts, statistical evidence, market trends.</b></li> <li>• <b>Results of investigations, focus groups or surveys</b></li> <li>• <b>Discussion and analysis of potential courses of action.</b></li> <li>• <b>Advantages, disadvantages, costs, and benefits of a particular course of action.</b></li> <li>• <b>Procedures or steps in a process</b> (e.g., closing a facility).</li> <li>• <b>Methods and approaches</b> (e.g., project management).</li> <li>• <b>Criteria for evaluating alternatives and options.</b></li> <li>• <b>Conclusions and recommendations.</b></li> <li>• <b>Supporting reasons for conclusions or recommendations.</b></li> </ul>	<p>The introduction and conclusion are often read more carefully than the body – be clear and complete.</p> <hr/> <ul style="list-style-type: none"> <li>• <b>Emphasizes your main points.</b></li> <li>• <b>Summarizes the benefits to the reader if you are recommended change or a specific course of action.</b></li> <li>• <b>Refers to all the key ideas and reminds the reader how they fit together.</b></li> <li>• <b>Brings all the action items together in one place.*</b> (Be sure to introduce any bulleted list and to follow such a list with a complete sentence tying the list into the flow of your writing).</li> </ul>

## Report Writing

In formal reports, there are typically three main sections to the document: 1) the prefatory pages, 2) the report itself, and 3) the supplemental pages. Guidelines are given for each of these sections.

Prefatory pages to a formal business report may include any of the following:

- cover page/title page (see example for this packet)
- transmittal (letter or memorandum)
- table of contents
- list of illustrations
- executive summary

Prefatory pages rely on the content of the report itself, and should be **WRITTEN AFTER THE FORMAL REPORT IS COMPLETED.**

## Transmittal Guidelines

The transmittal deliverable conveys your report to your audience. For internal audiences one should use memo format for this deliverable and for external audiences one should use letter format. The transmittal letter or memo says what you'd say if you were handing the report directly to the person who authorized it, so the style is less formal than the rest of the report.

The transmittal letter or memo can appear either before the title page or immediately before the table of contents. If before the title page, it is typically paper-clipped to the report, and unnumbered. If found before the table of contents, it is the first prefatory that is numbered, using Roman numeral "i" centered in the document's footer.

The transmittal letter or memo begins with the main idea, formally conveying the report to the readers and summarizing its purpose. It typically begins directly with a statement such as "Here is the X report (e.g., Financial report, Marketing Report, or Feasibility Report) you asked me to prepare on the ABC Division of Micro Corp." The remainder includes information about the scope of the report, the methods used to complete the study, and the limitations that became apparent.

In the middle section, you may also highlight important points or sections of the report, make comments on side issues, give suggestions for follow-up studies, and offer any details that will help readers to understand and to use the report. You may also acknowledge help given by others.

The concluding paragraph is a note of thanks for having been given the report assignment, an expression of willingness to discuss the report, and an offer to assist with future projects.

Look for how these goals are accomplished in the example provided from your text (p.63).

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**Global Communication Services**

*6108 Martin Lane  
Houston, Texas 77000*

January 6, 2007

Ms. Kerith Karetti, CEO  
Hamill Brothers, Inc.  
2708 W. 43<sup>rd</sup> Street  
New York, New York 10036

Dear Ms. Karetti:

We have enclosed our final draft of the marketing analysis you requested. We have enjoyed working with your team to identify the potential to expand your product into Asia. In the report, we have provided not only the analysis of the market but also some ideas on how you might move ahead.

Our analysis indicates a tremendous opportunity for your company, and we suggest you move forward in developing a complete marketing plan as soon as possible. We believe you and your team are positioned to move quickly using this analysis as your launching point.

If we can be of any further help as you move into this project, please let me know. We always enjoy working with your group and look forward to continuing our relationship in the future.

Sincerely,

**Janette Zuniga**

Janette Zuniga  
Senior Managing Director

Enclosure: Final Marketing Analysis to Determine Expansion Opportunities in Asia

Adapted from: Barrett, D.J. (2008). *Leadership Communication, 2<sup>nd</sup> edition*. Boston, MA: McGraw-Hill Irwin.

## Executive Summaries and Abstracts

What is an Executive Summary? An overview of another document or presentation designed to provide the executive with a clear enough understanding to make a decision based only on the Executive Summary. It can stand alone, if necessary, in conveying key points and conclusions.

### The difference between an “executive summary” and a “business brief”

An executive summary has to be included in a formal report – just like the table of contents. A formal report is not complete without a good executive summary. Business briefs and executive summaries may look very similar, but an executive summary accompanies a formal report whereas the business brief may stand alone. To be an executive summary the deliverable must summarize a larger document, frequently a Response to a Request for a Proposal or other major reports.

#### *How to Organize the Executive Summary:*

1. Establish the need or problem
2. Recommend the solution and explain its value
3. Provide substantiation (i.e., key evidence supporting your recommendation)

#### Tips

- **Use formatting and graphics to highlight your message.** Bullets and headings will make the executive summary easier to skim – do not make it all bullet points.
- **Use technology appropriately.** Many of your professional documents will be delivered electronically, so use the linking functions in Microsoft Word (enabling the reader to click to more information later in the document rather than scroll). One way to do this is via the “Insert” tab, selecting “Hyperlink” and specifying “Place in this document”.

## Tables and Figures in a Report

- Place the aid after the introduction and before the interpretation.
- Subordinate the reference to the aid.
- Label each aid.
- Interpret the aid (unless the reader would be insulted).

### Forbes honor roll of affordable M.B.A. programs

School	Tuition 1991-92 in state/out of state	GMAT <sup>1</sup>	Acceptance rate <sup>2</sup>	Yield <sup>3</sup>	Starting salary <sup>4</sup>	Employment rate <sup>5</sup>	Recruiters <sup>6</sup>
John E. Anderson Graduate School of Management at U Calif. Los Angeles	\$ 2,300	640	19%	53%	\$ 54,000	85%	200
Graduate School of Business, University of Texas, Austin	10,000	631	23	50	44,000	81	300
Kenan-Flagler Business School, University of North Carolina, Chapel Hill	3,790	620	13	57	51,500	85	155
Jesse H. Jones Graduate School of Administration Rice University, Houston	780	622	35	43	46,700	80	55
Indiana University School of Business, Bloomington	6,640	610	34	49	46,400	76	242
College of Business and Management, University of Maryland, College Park	9,750	600	32	57	44,600	83	85
Georgia Institute of Technology, School of Management, Atlanta	7,680	614	36	57	40,600	70	50
Joseph M. Katz Graduate School of Business, University of Pittsburgh	6,280	597	44	58	43,500	80	115
Baruch College of Business and Public Administration, City University of New York	11,220 <sup>a</sup>	560	39	63	41,900	93 <sup>b</sup>	400
Terry College of Business, University of Georgia, Athens	18,570 <sup>c</sup>	2,600	615	29	40,200	72	70
	2,770 <sup>a</sup>						
	7,360 <sup>a</sup>						
	2,080 <sup>a</sup>						
	5,520 <sup>a</sup>						

<sup>1</sup>Graduate Management Admission Test average score for all accepted students. <sup>2</sup>Percentage of applicants accepted out of those who applied. <sup>3</sup>Percentage of accepted students who decided to enroll. <sup>4</sup>Average starting salary for students who reported job plans. <sup>5</sup>Percentage of class with firm job plans at graduation. <sup>6</sup>Number of companies that interviewed on campus.

a: One-year program. b: Two-year program. c: includes employed part-time students.

### Improper Introduction of Aid

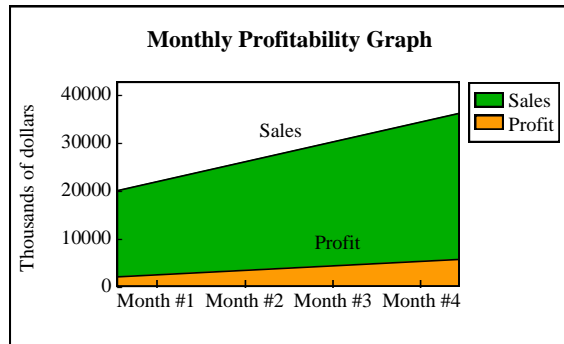
Table 1 gives an update on some of the "Excellent" companies featured in *In Search of Excellence*

Table 1 Updates on Some of the "Excellent" Companies Featured in *In Search of Excellence*

Company	Sales (in millions)		Return on Sales (percent)		Return on Equity (percent)	
	1979	1984	1979	1984	1979	1984
IBM	22,863.0	45,937	13.20	14.30	20.1	24.3
Proctor & Gamble	9,329.3	12,946	6.20	6.60	17.9	16.9
3M	5,440.4	7,800	12.04	9.40	22.2	18.7
Johnson & Johnson	4,211.6	6,100	8.36	8.44	17.7	17.1
Texas Instruments	3,244.1	5,742	5.36	5.36	18.2	20.0
Dana	2,761.1	3,600	6.00	5.55	17.6	16.0
Emerson Electric	2,614.1	4,179	7.70	8.36	19.2	18.7
DEC	1,804.1	5,584	9.88	5.89	15.9	8.3

SOURCE: Michael A. Hitt and R. Duane Ireland. "Peters and Waterman Revisited: The Unsettled Quest for Excellence," *The Academy of Management Executive*, Vol. 1, No. 2, May 1987.

Graph 1



### Introduction and Interpretation of Aid

As Table 1 shows, IBM is the only company featured in *In Search of Excellence* that showed improvement in both return on sales and return on equity from 1979 to 1984.

The remaining companies showed either no change or a decline in return on sales and/or on equity.

## Supplementary Pages

In the order of appearance, supplements include references (or bibliography), and appendices. All pages are numbered consecutively following the text of the report.

### References

- “References” is the term used for APA
- This page starts afresh with the heading bold and centered, as other main headings
- Entries are alphabetized (articles do not count when alphabetizing)
- Reverse indentation is used (first line is flush to the left margin following lines in same reference are indented 5 spaces).

### Appendices

- Follows the Reference (or Bibliography)
- Each appendix starts on a new page.
- Only one idea is presented per appendix
- Be consistent when labeling appendices.
- Using letters to identify appendices is more common than using numbers ... if you only have one appendix, then it is labeled “Appendix” (i.e., without numbers or letters).

## Citations

The most common style guides used in business are APA (American Psychological Association) for in-text citations and CMS (Chicago Manual Style) for notation. We will use exclusively APA style for the sake of clarity.

See the *APA Style & Academic Integrity Guidelines* provided by the [Franklin University Student Learning Center](#) (2009) for examples of proper citations or, alternatively, the APA manual at [www.apastyle.org](http://www.apastyle.org)

## Formatting: Pagination for Reports

*\* If your report is to be distributed and read in electronic format (e.g., on-line) the writer should use internal links to make it easier to navigate within the report.*

Every page in the report--except the cover and/or title--should have a number, but not all numbers are actually typed on each page. For the prefatory sheets, use lower case Roman numerals; for the body and supplement sheets, use Arabic numbers, according to these guidelines:

1. *Prefatory page numbers* are centered and placed one-**half inch** below the imaginary line that frames the bottom of the typewritten material. Count and number the prefatory pages as shown below:

Cover	Don't count or number
Title Page	Don't count or number
Transmittal	Count and number (Roman). A one-page letter is page i at the bottom center; a second page of the transmittal is page ii ( <i>this information is relevant only if the transmittal is within the report, not paper-clipped to front</i> ).
Table of Contents	Count and number each page (Roman)
List of Illustrations	Count and number (Roman)
Abstract	Count and number (Roman)

2. *Body and supplemental page numbers:*

- a) If your report is bound at the left, page numbers (Arabic numerals) are usually placed near the upper-right corner of the page, aligned with the right margin and a half inch (or double space) above the top imaginary line that frames the typewritten material. A running head (2-3 word descriptive of the report) is included as standard practice and placed about five spaces before the page number.
- b) If your report is bound at the top, page numbers are usually placed in the center at the bottom of the page, a half inch or double space below the imaginary line that frames the bottom of the typewritten text.
- c) Some style guidelines use centered numbers at the bottom of all pages following the title page.

## Business Writing Style

This section contains information related to an impersonal style of writing, a checklist of qualities considered for writing in the business context, and issues related to connectivity.

### Reports in the Impersonal Style

The impersonal style of writing means that first person pronouns (I, we, our, etc.) and second person pronouns (you and your) are not used. Many organizations write in the impersonal style because it draws attention away from the person doing the action.

In some cases, the action taken is more important than who performed the action, as illustrated in the following sentences.

We completed the project three weeks early. *(Focuses on who completed the action)*

The project was completed three weeks early. *(Focuses on the action taken rather than who did it)*

---

Another good reason for using the impersonal style is that the writing is usually more concise, as shown below.

I surveyed 200 employees and found that 65 percent of them prefer the cafeteria plan for benefits. *(wordy and focuses on who)*

Of the 200 employees surveyed, 65 percent prefer the cafeteria plan for benefits. *(concise, de-emphasizes who took the action)*

---

However, the impersonal style has its drawbacks. First, if you must refer to yourself, you have to say "the writer" or "the author," which is awkward writing. Second, it often leads to using passive verbs and "it is" phrases, both of which may lead to wordiness. Note these problems in the following examples.

Poor: The authors recommend that the company purchase five PCs for the personnel department. *(awkward)*

Poor: It is recommended that the company purchase five PCs for the personnel department. *(wordy)*

Poor: It is believed that the project will be completed on time.  
(*passive verb*)

To overcome problems associated with the impersonal style, try these suggestions:

1. Focus on the action, not who performed the action.
2. Use nouns as subjects, not pronouns (e.g., Kathleen vs. she, Lima Corporation vs. it).

## Qualities of Well-Written Reports

1. Use specific words and figures for a fair and convincing report.
2. Identify information sources, except for information that is considered common knowledge.
3. Avoid emotional writing (glowing adjectives and adverbs) that reflects your opinions.
4. Present facts impartially. Show both sides when necessary.
5. Use concrete nouns as subjects of sentences.
6. Place action in verbs, not nouns (nominalizations).
7. Use active verbs when possible.
8. Avoid the subjunctive mood when possible. Instead of using would, could, and might, use will, can, or may.
9. Write in the present verb tense when possible. For facts that are considered still true, use the present tense.
10. Omit your opinions unless your supervisor asks for them. Then, clearly state that they are your opinions. In reports written in the impersonal style, refer to yourself as the author. For example, "In the author's opinion. . . ."
11. Keep sentences to within 20 words and paragraphs 6-8 lines.
12. Define any technical terms in the introduction, text, or appendix.
13. Highlight the main idea of a graphic aid before showing it, and put any additional interpretation after it.
14. Use parallel construction in headings and bulleted lists (e.g., the same type of wording and level of detail).
15. Use transitions for connectivity.
16. List and number conclusions and recommendations if you have more than one.
17. Include no new information in the Conclusions section.
18. Number the prefatory pages with lower case Roman numerals. Use Arabic numbers (1, 2, etc.) to number the body, reference (bibliography), and appendix pages.

## Guidelines for Writing Effective Memos

*(\*Remember you use the memo format for the transmittal or cover letter for internal reports).*

Date: (also serves as a chronological record for future reference)

To: Name of recipient, title

From: Your name, title

Subject: Insert a Brief Descriptive Label (used for Filing Purposes)

2 spaces here

There is no salutation.

An introductory paragraph provides the purpose of the memo and outlines the topics to be covered. The guidelines on this page show and tell you one professional way to format a memorandum that utilizes headings. Headings are used when more than one topic is covered in the memo. Note that the introductory paragraph does not get headed. Also, headings should be placed closer to their text (i.e., more space above the heading than below). It's important to pay attention to the subject line, topic headings, and paragraph spacing.

A concluding paragraph is needed to tie the memo topics together and to cordially close. This closing paragraph prevents the document from just ending abruptly. In brief documents, a "conclusion" heading is not necessary.

There is no closing (e.g., Sincerely) or signature.

# Writing Checklists

## Reports

### Title Page

- \_\_\_\_\_ Descriptive, meaningful title (*bold, larger font, about 2 inches from top*)
- \_\_\_\_\_ Prepared for (*bold, for not capped, no colon*)
  - \_\_\_\_\_ Reader(s), Title(s)    \_\_\_\_\_ Organization    \_\_\_\_\_ Location
- \_\_\_\_\_ Prepared by (*bold, for not capped, no colon*)
  - \_\_\_\_\_ Writer(s), Title(s)    \_\_\_\_\_ Organization    \_\_\_\_\_ Location
- \_\_\_\_\_ Date
- \_\_\_\_\_ No typos, especially names

### Table of Contents

- \_\_\_\_\_ Wording matches headings
- \_\_\_\_\_ Numbers align on right, with only one number identified
- \_\_\_\_\_ Series of indentation with main points flushed left
- \_\_\_\_\_ A minimum of two headings (if more than one section)

### Formatting

- \_\_\_\_\_ One inch margins, unless bound. If bound, 1.5 inch margin on left.
- \_\_\_\_\_ Double spaced reports with lines between paragraphs
- \_\_\_\_\_ Standard (5 spaces) indentation of paragraphs
- \_\_\_\_\_ 12-point font for text, headings can be larger
- \_\_\_\_\_ Serif font for text (e.g., Times New Roman)
- \_\_\_\_\_ Concise sentences (rarely exceeding 20 words per sentence)
- \_\_\_\_\_ Concise paragraphs (keep to within 6 lines, 8 lines max)

### Pagination

- \_\_\_\_\_ Title page unnumbered

\_\_\_\_\_ Prefatory pages labeled with Roman numerals, bottom center

\_\_\_\_\_ Report, starting at "Introduction," Running head with Arabic numerals, upper right corner

### Writing Style / Content Issues

\_\_\_\_\_ Impersonal style if appropriate (e.g., more formal or cultural expectation)

\_\_\_\_\_ Topic sentences

\_\_\_\_\_ Transitions, especially when switching main sections

\_\_\_\_\_ Importance / relevance of each section noted

\_\_\_\_\_ No typos and grammatically clean

### Citations

\_\_\_\_\_ APA for in-text citation

\_\_\_\_\_ All in-text citations are included in the Reference list

\_\_\_\_\_ Cite all borrowed text, unless common knowledge

\_\_\_\_\_ Use direct quotations sparingly, opt for paraphrasing

### Memos

Date: February 2, 2009

To: Name, title (*optional, include only if included below*)

From: Name, title (*consistent with above*)

RE: 3-5 descriptive words

\_\_\_\_\_ Leave two spaces before typing

\_\_\_\_\_ No heading needed -- just start with purpose and other relevant introductory elements

\_\_\_\_\_ Single spaced, unless a memo report, which can be double spaced

\_\_\_\_\_ Paragraphs: white space between paragraphs, no indentation of paragraphs

\_\_\_\_\_ No salutation, no signature (closing)

\_\_\_\_\_ Concluding (or cordial close) paragraph to end

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## Letters

\_\_\_\_\_ Writer Address or Company Letterhead

\_\_\_\_\_ Date

\_\_\_\_\_ Reader Name and Address

\_\_\_\_\_ Salutation with Colon

\_\_\_\_\_ Body, single spaced, no indentation, lines between paragraphs

\_\_\_\_\_ Closing with comma

\_\_\_\_\_ Signature above typed name, job title

\_\_\_\_\_ p.s. lines or reference to enclosures (note the number of enclosures)

Example of a Full-length report:

[http://www.greaterohio.org/restoring\\_prosperity/rp\\_policy\\_summit.htm](http://www.greaterohio.org/restoring_prosperity/rp_policy_summit.htm)

Example of a Letter:

[http://www.greaterohio.org/restoring\\_prosperity/summit\\_docs/welcome\\_letter.pdf](http://www.greaterohio.org/restoring_prosperity/summit_docs/welcome_letter.pdf)

## Appendix A: E-mail, IM or Text Messaging, Business Briefs, and Letters

The information provided in this appendix may seem rudimentary to many MBA students. These tips and formatting guidelines are based on APA and the application of APA shown in your text. Bear in mind that we enjoy significant diversity in our MBA student population, including type of work experience and technical skills.

### E-mail

Electronic mail or e-mail is a mainstay in business and is frequently a mode of both internal and external communication. We need to be aware of the quality of our e-mail writing because it represents us and our organization and is a permanent document. E-mail “feels” very temporal and temporary, but in fact e-mail can be kept indefinitely and has been used as evidence in court cases. So not only is it permanent, it is always potentially public. Your company’s e-mails could be subpoenaed.

Sources for E-mail Tips

[http://careerplanning.about.com/od/communication/a/email\\_tips.htm](http://careerplanning.about.com/od/communication/a/email_tips.htm)

[http://email.about.com/od/emailnetiquette/tp/core\\_netiquette.htm](http://email.about.com/od/emailnetiquette/tp/core_netiquette.htm)

<http://tech.blorge.com/Structure:%20/2007/04/16/the-nine-golden-rules-of-email-etiquette/>



### Instant Messaging/ Text Messaging

Instant messaging (IM) and “texting” or text-messaging are also becoming common modes of communication in professional settings. While these modes of communication can be more immediate, in terms of expediency, they are also less formal than e-mail. Here are a few basic suggestions, but tip

number one is always “consider your audience”. Some of us are IM challenged – so your client may or may not be fluent with the technology.

### IM Etiquette

- Update status indicators appropriately, for example, "in a meeting" versus "online" or "available".
- It is always appropriate to ignore IM. So long as that is understood, one can avoid hurt feelings when someone is simply too busy to respond, even if online.
- Just like a phone call, it is advisable to ask someone if they have time to chat, and to suggest how long the interchange may take: "Hi. Do you have a few minutes for a question?", for example.

Sources for IM and Text-messaging tips:

<http://www.inc.com/articles/2002/06/24304.html>

[http://www.pcworld.com/article/99405/instant\\_messaging\\_etiquette.html](http://www.pcworld.com/article/99405/instant_messaging_etiquette.html)



### **Business Briefs/ Memos/ Short Assignments**

Is it a memo or a business brief? Memos are internal documents only – not for distribution beyond your organization. Business Briefs are commonly used both internally *and externally* and may take the place of some types of reports (e.g., project progress reports). One can argue that memos and briefs are really the same thing; a very condensed form of report that highlights key pieces of information. Memo is an older term and, depending upon your industry or company, the term memo or brief may be used interchangeably. In the MBA program note that the key difference is that we assume memos are solely for internal use, whereas a business brief may be addressed to an external client or agent.

**What is the difference between an “executive summary” and a business brief?** An executive summary has to be included in a *formal report* – just like the table of contents. A formal report is not complete

without a good executive summary. Business briefs and executive summaries may look very similar, but an executive summary is not a “stand alone” document. To be an executive summary the deliverable must summarize a larger document, frequently a Response to a Request for a Proposal or other major reports.

If your instructor assigns you an article or set of articles and asks you to write a summary and response or analysis of these articles that would be an Abstract or Business Brief, not a true executive summary.

### **Letters**

Remember to use full-block format for any type of letter – Cover letter, Transmittal letter, or Routine Negative Message letter. See page 63 in *Leadership Communication* for a sample transmittal letter.

(Routine Negative Message)

**Braniff Airlines**  
121 No. 20<sup>th</sup> Blvd.  
New York, New York 10021

April 10, 2009

Dear John:

As you know, Braniff has encountered extremely difficult financial times over the last few months. We have done everything we can to keep the airline functioning as in the past so that we can serve our public and keep all of our employees. Now, however, we have come to a point where we must make some difficult decisions. The most difficult decision is having to let some of our people go. Regrettably, your department is one that we must cut. Therefore, as of May 10, 2009, we will no longer authorize work in your department.

Your severance package will include the following...[to be filled in by HR]

We all regret that the layoffs are necessary. We value your department and your individual contributions to Braniff Airlines. We appreciate your sales efforts over the years and wish you the best for the future.

Sincerely,

*James T. Cole* (Note that per etiquette all letters should be signed – using an electronic signature or pen signature)

James T. Cole  
Director of Reservation Sales

(In *Leadership Communication*, pg 96)<sup>1</sup>

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<sup>1</sup> Adapted from Barrett, D. J. (2008). *Leadership Communication*, 2<sup>nd</sup> ed. New York, NY: McGraw Hill Companies, Inc.

## Appendix B: Presentations

Business presentations are different from public speaking presentations, however, all good presentations start with audience analysis.

### Sample Audience Analysis and Adaptation Worksheet

Speaker \_\_\_\_\_ Topic \_\_\_\_\_

What is the audience for this speech? \_\_\_\_\_

What is the specific purpose of this speech? \_\_\_\_\_

In choosing a specific purpose, how can you narrow the topic so it will be appropriate to this audience?

\_\_\_\_\_

**Demographic audience analysis:** What special adaptation is necessary in the speech because of the audience's

age \_\_\_\_\_

gender \_\_\_\_\_

sexual orientation \_\_\_\_\_

religion \_\_\_\_\_

racial, ethnic, and cultural background \_\_\_\_\_

group membership \_\_\_\_\_

other (specify) \_\_\_\_\_

**Situational audience analysis:** What special adaptation is necessary in the speech because of the audience's

size \_\_\_\_\_

response to the physical setting \_\_\_\_\_

knowledge about the topic \_\_\_\_\_

interest level in the topic \_\_\_\_\_

attitude toward the topic \_\_\_\_\_

disposition toward the speaker \_\_\_\_\_

disposition toward the occasion \_\_\_\_\_

### Audience Analysis and Adaptation Worksheet

Speaker \_\_\_\_\_ Topic \_\_\_\_\_

**Adaptation in the speech:** Answer each of the following questions.

What device(s) did you use in the introduction to gain attention from this audience?

\_\_\_\_\_

What steps did you take to relate the topic directly to this audience in the introduction?

\_\_\_\_\_

What are the main points of the speech? Why did you develop these particular main points for this audience?

\_\_\_\_\_

What decisions did you make in choosing supporting materials for this audience?

\_\_\_\_\_

What steps did you take to make your language clear and appropriate to this audience?

\_\_\_\_\_

What adjustments did you make in delivery—rate of speech, volume, tone of voice, gestures, and the like—to communicate your ideas to this audience?

\_\_\_\_\_

## Individual Presentations

- Note that one should wear appropriate business attire for presentations.

### Sample of a Basic Speech Outline

#### **I. INTRODUCTION**

##### A. ATTENTION GETTER

Complete sentence to describe

*Transitional phrase: For the next few minutes I will explain*

##### B. THESIS STATEMENT

*Transitional phrase: I will do this by*

##### C. PREVIEW

*Signpost*

#### **II. BODY**

*Transition*

##### A. MAIN POINT

*Who, what, when, why, how, where*

1.

2.

*Transition*

##### B. MAIN POINT

*Who, what, when, why, how, where*

1.

2.

*Transition*

#### **III. CONCLUSION**

##### A. REVIEW THESIS/MAIN POINTS

##### B. ENDING