Introduction

Almost all business activities are envisioned, planned, implemented and analyzed in some form of the written word. These forms include reports, and report summaries, letters, memos, and email, any document, in fact, that communicates something about business. Collectively, they are the hard-copy paper trails recording the proposals, activities and results of countless business transactions.

Public and private entities rely upon these documents to communicate vital information, both internally and externally, regarding the condition and conduct of their business. It is fundamentally important that they be written in a clear and concise manner. When they are, the risk of miscommunication is greatly reduced.

Poorly written business documents can produce unintended results and potentially disastrous consequences. Strong writing competencies can help reduce or avoid this all together. Well chosen words, well organized and well written, increase the likelihood of effective business communication.

That said, business writing is as simple as eating an elephant. Do it one bite at a time. Think strategically, divide and conquer. Writing is a process consisting of several interrelated steps:

- Preparation
- Research
- Organizing
- Drafting
- Review and Revision

These steps break the larger writing task into smaller ones. Proceeding through them one at a time will help you write successful business documents. Depending on the complexity of the writing task, they will be either more or less demanding. An annual report requires far more, for instance, than a memo.
Preparation

Preparing to write is as important as the act itself. There are three preliminary considerations that are fundamental to the task. You must establish a document's objective, identify its readers and determine its scope. All other steps in the writing process follow and develop from these determinations.

Objective

Establishing an objective will answer one critical question about your writing task. What do you want the reader to know or do, or be able to do after reading your document? The answer needs to be specific and detailed. If the objective is too general it will be difficult, if not impossible, to present a credible argument or a compelling reason to read the document. For Example:

*Not So Good:* To explain the proposed cafeteria at Better Widget Makers, Inc.

*Good:* To explain how the newly proposed cafeteria at Better Widget Makers, Inc. will benefit the employees, the company and the Silver City community.

A specific objective, simply stated, can be viewed as a thesis statement for your writing project. Notice how the above example includes three main topic areas and how easy it will be to convert them into main headings below the thesis statement in an outline.

Readers

Identifying your readers will answer another critical question about the writing task. How can you help them understand your objective? Knowing who your readers are and what they need from you is crucial to satisfying your objective. It will also determine the scope of your writing task. Successful business writers know that the answers to who and what will lead to how. So target your audience and get to know a few things about them.

Ask yourself some key questions. Who is going to read your document? Will it be one person or many? Are you writing a letter to a new client or a quarterly summary for the Chief Financial Officer? Are you writing a departmental memo or the shareholders annual report? What information will they need?

Notice the hierarchical status of different readers. Understand that this status defines the reader’s relationship to a subject or topic. It indicates something about what their perspective or personal interest might be and something about how much they might already know, or how much they might need to know about the material.

Once you have a clear understanding of your audience you are prepared to determine the scope of your document, write effectively, both of which will help your readers understand your objective.

Scope

Determining the scope of your writing task will answer a final question? What kind of information is needed, and how much of it will be enough for the reader to understand your objective? In light of both the objective and the audience, this will either be elementary, intermediate or advanced?

What and how much to include is a decision based on who the reader is, why they were targeted and what relationship they have to your document’s topic. Successful business writers keep all of this in mind as they gather information in the research step of the writing process.
Research

Research is an investigative process. The information and data necessary for the completion of a writing task is gathered in this step. The amount required will depend upon the document’s primary objective, the breadth of its scope and its intended audience; the more complex your topic, the more in depth the research.

A letter or memo may require no more than a list of related ideas and your research may consist only of finding the name of the contact person to whom you are writing. A report or summary, on the other hand, may require something more. Before writing a report projecting the earnings-to-expense ratio for the coming year, for instance, you might want to meet with the accounting staff for a review of quarterly financials from previous years.

Regardless of the amount of research, the information you gather will fall into one of two categories. Depending upon the source, your information will be either primary or secondary. Depending upon your objective, scope and audience you may rely more heavily on one than the other.

Information gathered from multiple sources will provide the facts that substantiate and clarify your objective. As you identify relevant sources of information, include yourself. Personal experience counts. After all, among the credentials underscoring your involvement in the writing task are your background qualifications and your first-hand knowledge of the topic. Search your own personal resources. Check your own databases. Look in the file cabinet.

As your research progresses, compile notes, either on index cards or in a computer. Include what you already know about the subject and what remains to be discovered. Brainstorm with yourself and others. Ask lots of questions. Who, what, and where? When, how and why? Note your sources and double-check your facts. Accuracy is mandatory. The Writing Studio’s Bibliography Tool allows you to take and organize your notes and sources.

Thorough research is the backbone of any successful business document. Once completed, you must organize your notes and prepare an outline that illustrates the manner in which your information will be presented in the written document.

Organizing

Organizing is a sorting and categorizing procedure. It prepares the writer to present research materials in a methodical manner. It is also the design stage of a writing task, the step in which decisions are made on how a topic will be developed. A well-organized presentation maximizes the likelihood that your reader will easily comprehend the scope of your writing task, the more likely it is that these groups will develop into distinct sections of your finished document.

Once your notes are organized you are ready to construct an outline, the scaffolding upon which you hang the beginning, middle and ending of your writing project. It will provide the kind of infrastructure that, without, writing
projects quickly fall apart. As you begin drafting the written elements of your document, a well-constructed outline will help shape and control your thinking.

**Outlining**

An outline is a blueprint or set of plans for a written document. It should be constructed after you have decided upon the organizational method with which you are going to present your research material. Its purpose is to show you where everything is going to go in your finished document.

The complexity of your outline will depend upon the extent, or *scope*, of your writing task. Letters and memos require only a simple list such as that found in Sample 1. Summaries and reports, on the other hand, may require more complete sets of instruction such as those found in Sample 2 and Sample 3. The difference between them is in their levels of formality. Sample 2 falls midway between a low level and a high level of formality and might be used for a summary report.

Regardless of its complexity, an outline describes the decisions you have already thought out and places the content you intend to include in your document in a sequential order. A well-built one serves as a guideline when developing your rough draft, and a point of reference when reviewing and revising your writing. It will help keep you on track.

**Sample 1: Simple List**

A simple list is an informal ordering of the main points a writer intends to include in a written document. Like a grocery list, its purpose is largely as a reminder and can be made of words, phrases or complete sentences.

In the sample below Ms. Ida Mae Knott, the purchasing agent for Better Widget Makers, Inc., has outlined the main points she intends to include in an inquiry letter to the Vice-President of Sales and Marketing at the Golden Bread Company. She has made a simple list of phrases and notes to help guide her letter-writing task.

Ms. Ida Mae Knott's Inquiry Letter Outline
1) Contact Person - Mr. Russ Hamilton - VP Sales & Marketing - Get address.
2) New cafeteria almost complete - Need food vendors
3) Bakery goods to be outsourced - Need wholesale contract soon
4) Dangle carrot - buying locally is company policy
5) Building pro forma - Supply internal logistics - Ask for help
6) List of info needed - Price sheets - Cost breaks - Annual discounts - Other
7) Mention deadline

Not all lists are as simple as Ms. Ida Mae's. An outline for a short summary of an annual stockholder's report might include whole paragraphs, as in Sample 2, with more details regarding which important points from each section of the report should be included in the summary.

**Sample 2: Intermediate Outline**

**Sample 3: Complex Outline**

Writing@CSU: [https://writing.colostate.edu/guides/guide.cfm?guideid=70](https://writing.colostate.edu/guides/guide.cfm?guideid=70)
A complex outline has headings and subheadings for each topic. Main topics become main headings. Key points become subheadings, and lesser subordinate points. In this way a complex subject can be divided into its parts and the whole project seen and thought about more clearly.

These divisions are quite often sentence fragments. Take each one and turn them into complete sentences. Main headings can be turned into topic sentences and subheadings can be turned into supporting sentences. The details form your research notes will fill in the body of your text.

Drafting

This step in the writing process is often considered the most difficult. Experienced writers avoid undo frustration with careful and systematic preparation. They establish their objectives, identify their readers and determine the scope of their projects first. They conduct research and organize their ideas and information before beginning a draft.

Once these preparations are well in hand, it is time to start a rough draft of a writing project. This task is not without its difficulties, but neither is it as hard as you might think. Remember that you are already prepared, that you already have an outline. All you are going to do now is enlarge it, fill it in with details from your research notes.

Keep a few things in mind. A rough draft is not a finished document. No one but you ever has to see it. Don't worry about polishing what you write. Just write. Don't worry about beginnings, middles and endings. Just write. Start where you are most comfortable and most knowledgeable. Don't worry about spelling, grammar and punctuation. Don't worry about fragments, run-on sentences or transitions. A rough draft is supposed to be rough. If it is not, you have gotten ahead of yourself in the writing process.

Focus on the ideas you want to present. Get them down on paper as straightforward as possible. Consult your outline as you work. You might consider sharing your work with others early on in the drafting process. Collaborative input from business associates can be very helpful in evaluating how well your objective is being met. Collaboration at this stage also acts as a safety net. Two sets of eyes will analyze content and spot mistakes quicker than one. This can be a real time saver and in business, time is money.

And finally, don't get discouraged if writing a rough draft turns out to be rough going. Even experienced business writers encounter obstacles at this stage of the process. It is often called writer's block and there are tactics with which it can be overcome. Keep in mind that whether your writing task is a letter, or a memo, a report or a summary, the finished document will come when you review and revise the rough draft.

Reviewing and Revising

Reviewing and revising a rough draft transforms your writing into a finished business document. This is a crucial step and should be done with a great deal of care. Approach it rested. As a matter of fact, when your rough draft is complete, set it aside for a day or two. Distancing yourself like this will do you a world of good; it
will clear your head. When you return to your draft you will be able to review and revise it with a sharper, more objective and critical eye, first as its reader and then as its writer.

Adopting the reader's point of view will allow you to assess whether or not the writer's objective was met. Being both reader and writer places you in a unique position to analyze what you have written. After all, you are the only reader who knows what the writer was thinking and what the intended scope of the document is and what message it is supposed to convey. This is a distinct advantage. Be painstakingly honest with yourself, and fussy, too. Remember, whether by a large or a small degree, once you have reviewed and revised your draft you and your writing are going public.

Critiquing your own writing can be a daunting challenge, but with practice and a good set of guidelines, this step of the writing process does become easier. A handful of key questions encompass the main points that review and revision should cover. By approaching the process with a checklist, you can divide the task into smaller ones, each of which can be tackled individually. When you have completed your checklist, ask one of your associates to give it a final read. In-house collaboration will help ensure that your final document meets its objective. Check the list twice, in other words.

**Review and Revision Checklist**

The following list of questions is a guide to help you review and revise your writing. The questions themselves are in no particular order and may be tackled according to your own preference. Every writer works differently. Start with what makes the most sense to you, or what you are most comfortable with, and proceed from there. Regardless of where you begin, be meticulous. Have your outline handy and refer to it as you work.

1. Is your document complete? If not, what is missing? Does it begin with an appropriate opening or introduction? Does it end with a logical conclusion? It is not unusual for these items to be left out until the body of the document has been drafted.
2. Does the content of your document read with a sense of unity and coherence? If not, why? Are the transitions between paragraphs weak? Is the point of view consistent? Unity and coherence will be evident when each sentence in a paragraph advances the main point stated in the topic sentence, and each paragraph advances the main topic of the document, and each of these units is clearly related to the one before it and the one following.
3. Do the most important points in your document stand out from the lesser ones? If not, how can they be repositioned? The proper emphasis and subordination of ideas can be achieved through changing their placement within a sentence, paragraph or document.
4. Are the ideas in your document clearly stated? If not, what obstructs their clarity? Is your word choice appropriate throughout the document? Have new or unfamiliar terms been properly defined or explained? Are there any phrases that obscure the clarity of your ideas?
5. Is your document presented in an appropriate style? If not, how can it be corrected? Is your voice active or passive? Is your writing positive or negative? Is the pace appropriate? Style is concerned with readability, the manner in which a document is written, rather than its substance. Good writing style helps the reader comprehend the substance of your document.
6. Does your document sound awkward? If so, how can its content be better articulated? Is your tone consistent? Read the document out loud or have one of your associates read it to you rather than relying on your inner ear. Listen for the natural rhythm of the spoken word. Are there any grammar, punctuation or spelling errors? Recognizing and solving these kinds of problems will smooth out the rough edges of your document and improve the natural flow of your ideas.