

BSBWRT301

Write simple documents

Release 1

Learner guide

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Aspire Version 1.1

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BSBWRT301 Write simple documents Release 1

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Before you begin

This learner guide is based on the unit of competency *BSBWRT301 Write simple documents*, Release 1. Your trainer or training organisation must give you information about this unit of competency as part of your training program. You can access the unit of competency and assessment requirements at: www.training.gov.au.

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How to work through this learner guide

This learner guide contains a number of features that will assist you in your learning. Your trainer will advise which parts of the learner guide you need to read, and which practice tasks and learning checkpoints you need to complete. The features of this learner guide are detailed in the following table.

Feature of the learner guide	How you can use each feature
Learning content	Read each topic in this learner guide. If you come across content that is confusing, make a note and discuss it with your trainer. Your trainer is in the best position to offer assistance. It is very important that you take on some of the responsibility for the learning you will undertake.
Examples and case studies	Examples of completed documents that may be used in a workplace are included in this learner guide. You can use these examples as models to help you complete practice tasks and learning checkpoints. Case studies highlight learning points and provide realistic examples of workplace situations.
Practice tasks	Practice tasks give you the opportunity to put your skills and knowledge into action. Your trainer will tell you which practice tasks to complete.
Video clips	Where QR codes appear, learners can use smartphones and other devices to access video clips relating to the content. For information about how to download a QR reader app or accessing video on your device, please visit our website: www.aspirelr.com.au/help
Summary	Key learning points are provided at the end of each topic.
Learning checkpoints	There is a learning checkpoint at the end of each topic. Your trainer will tell you which learning checkpoints to complete. These checkpoints give you an opportunity to check your progress and apply the skills and knowledge you have learnt.



Foundation skills

As you complete learning using this guide, you will be developing the foundation skills relevant for this unit. Foundation skills are the language, literacy and numeracy (LLN) skills and the employability skills required for participation in modern workplaces and contemporary life.

The following table outlines specific foundation skills noted for your learning in this learner guide.

Foundation skill area	Foundation skill description
Reading	<ul style="list-style-type: none">• Recognises and interprets a variety of text to determine and confirm task requirements• Proofreads documents checking for grammar, spelling, structure, suitability of style and format for audience
Writing	<ul style="list-style-type: none">• Produces and edits basic documents, according to organisational requirements, for a given audience and purpose
Oral communication	<ul style="list-style-type: none">• Uses listening and questioning skills to seek additional information or confirmation of task completion
Navigate the world of work	<ul style="list-style-type: none">• Understands and complies with organisational policies and procedures
Interact with others	<ul style="list-style-type: none">• Follows accepted communication practices and protocols when seeking information or feedback from others
Get the work done	<ul style="list-style-type: none">• Takes responsibility for planning, sequencing and prioritising tasks to achieve required outcomes• Uses the main features and functions of digital tools to complete work tasks

What do you already know?

Use the following table to identify what you may already know. This may assist you to work out what to focus on in your learning.

Topic	Key outcome	Rate your confidence in each section
Topic 1: Plan document	1A Determine audience and purpose for the document	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	1B Determine the format and structure	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	1C Establish key points for inclusion	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	1D Identify organisational requirements	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	1E Establish method of communication	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	1F Establish means of communication	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
Topic 2: Draft document	2A Develop draft document to communicate key points	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	2B Obtain and include any additional information that is required	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
Topic 3: Review document	3A Check draft for suitability of tone for audience, purpose, format and communication style	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	3B Check draft for readability, grammar, spelling, and sentence and paragraph construction	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	3C Check draft for sequencing and structure	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident

continued...

continued...

Topic	Key outcome	Rate your confidence in each section
Topic 3: Review document	3D Check draft to ensure it meets organisational requirements	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	3E Ensure draft is proofread, where appropriate, by supervisor or colleague	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
Topic 4: Write final document	4A Make and proofread necessary changes	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	4B Ensure document is sent to intended recipient	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	4C File copy of document in accordance with organisational policies and procedures	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident

Topic 1

Plan document

Organisations require many written documents such as letters, memos, faxes, emails and reports. These can be produced and kept for different reasons and written for different audiences. When you write a simple document, you need to think about the message you are communicating. You need to write clearly and in plain English so that it is easy for the reader to understand. This means you have to be clear about the purpose of the document and who it is for. You have to decide on the style of document and have good written communication skills and good formatting skills.

In this topic you will learn how to:

- 1A Determine audience and purpose for the document
- 1B Determine the format and structure
- 1C Establish key points for inclusion
- 1D Identify organisational requirements
- 1E Establish method of communication
- 1F Establish means of communication

1A

Determine audience and purpose for the document

When preparing a business document, it is important to have a clear idea of who the document is for and what the document is about. This ensures that your communication is professional and represents the organisation in the best possible way.



Understand the document's purpose

Business documents are used for many purposes. The following chart outlines a range of situations when a simple business document needs to be prepared, with examples of what the document might be about. Such documents may be for external customers (such as clients or suppliers) or internal customers (such as staff within an organisation). The role of many of the documents is to communicate information. Other documents may be prepared to store data or keep a permanent record of information.

Purpose of communication

1

Acts as a reminder

Acts as a reminder about:

- due dates for invoices
- dates of meetings
- personal behaviour or dress codes.

2

Provides advice or instructions

Provides instructions to staff about:

- how to fill in pay slips or leave forms.

3

Clarifies information

Clarifies information about:

- new working conditions
- safety procedures
- work processes
- structure of work teams.

4

Requests information

Requests information such as:

- a file
- work plans
- client feedback.

5

Requests advice

Requests advice such as:

- marketing predictions.

6

Publicises an event, activity or achievement

Publicises:

- new staff training
- staff appointments
- marketing events.

7

Provides statistical or factual information

Provides data such as:

- monthly sales figures
- meeting agendas
- minutes of meetings
- meeting outcomes
- new products.

8

Provides database information

Provides information such as:

- lists of clients
- addresses
- personnel details.

9

Provides evidence of the organisation's activities

Provides evidence of:

- telephone calls
- copies of letters sent.

10

Keeps a permanent record of decisions made

Keeps records such as:

- minutes of meetings.

Who is the document for?

Once you know the purpose of your document, the next step is to be clear about who you are writing it for. Who is your audience? Understanding the purpose of your document and the audience you are writing for affects what you write, how you write it and in what format you present it. You must be clear about these topics before you start preparing your draft.

Business documents can be for internal customers – all staff members, a department or the management team. Alternatively, they can be for external customers – buyers, service providers or government departments.



Different requirements

Different readers require different styles. There are different communication protocols for writing to different readers. For example, a letter to a customer should be written in a formal, professional style, while an email to a colleague might be less formal in the way it is set out and the language used.

You should also consider whether the document is for a large group or a small group of people. Are they similar people, such as a work team, or are they different people, such as a range of customers? When you have a clear picture of your audience (who the document is for) and the purpose of the document, you will also understand what they need to know, what language and style to use and how to present the document.

So, think about who you are writing for (audience), what they need to know (content) and why they need to know it (purpose).



Practice task 1

1. Look at any business document you have received at work or in the mail. What is its purpose? Is the purpose clear? If so, how has the writer made their purpose clear?

2. Can you think of any ways in which writing to a group of people would be very different from writing to one person?

1B

Determine the format and structure

After you have established the document's audience, content and reason or purpose, you also need to think about the best way to present your document, in terms of its format and structure. Broadly, there are two types of documents: documents that communicate information and documents that store information.

When you are asked to produce a document, you should be very clear about what the document is for. This helps you decide how much you need to write and what format the document should take. You need to be aware of the communication protocols that determine the format and structure of your communication.



Types of business documents

Documents that store information include reports from databases, responses to questionnaires and product records.

Documents that communicate information include:

- business letters and faxes
- memos and emails
- briefing papers
- meeting documents
- reports; for example, financial reports, research reports, progress reports
- tables; for example, schedules, financial spreadsheets
- forms; for example, questionnaires, surveys.

Choose an appropriate format and structure

Once you know your audience and the purpose of the document, you can decide what format the document should take. You then need to check the structure required for the format you have chosen. Do you need to use a formal template or can you develop your own? Consider whether the document needs to be prepared so it can be scanned easily for on-screen use. If you are preparing a brief report, does it need to follow a preset organisational style?

Some organisations require you to use a standard template for formatting letters, faxes and memos. There are also standard templates for business documents in most word processing programs. The set of rules that define the format of the communication is referred to as a protocol.

A template ensures you follow the set communication protocols. It provides a structural framework for a document and includes fonts, page layout and styles. Your task is to key in the content specific to the document.

Example: standard templates downloaded from Microsoft Word

Company name here [Click here and type return address]

Date

[Click here and type recipient's address]

Dear Sir or Madam,

Type your letter here.

Yours faithfully

[Click here and type your name]
[Click here and type job title]

continued ...

... continued

<p>Company name here</p> <p>Memo</p> <p>Date: 1/07/2016</p> <p>To: [Click here and type names]</p> <p>Cc: [Click here and type names]</p> <p>From: [Click here and type names]</p> <p>Re: [Click here and type subject]</p> <p>[Click here and type your memo text]</p>
--

Business letters

Letters are used to pass on a wide range of business information. They are used when evidence or a record of business activities is required. They also provide a personal point of contact between your organisation and its clients. Letters that are well-written and well-presented give a good impression of an organisation. Here are some common types of letters.

Acknowledgments

For example:

To confirm that your organisation has received something or to acknowledge a job application

Complaints and claims

For example:

To let a branch of your organisation know of a customer complaint or to inform a supplier they have delivered faulty goods

Adjustments

For example:

To reply to a complaining customer to let them know of the resolution to their problem

Covering letters

For example:

To accompany what is being sent in a parcel of goods or as an attachment to a document

Follow-up letters

For example:

To confirm something that has been agreed to verbally or to confirm a date or time for a meeting

Inquiries

For example:

To supply information about who will be at a meeting or to find out the availability of a conference centre

Requests

For example:

To seek quotations for a service or to ascertain prices

The structure of business letters

There is a set of communication protocols that are applied when preparing a business letter. Most organisations use what is called a fully blocked layout. This has the entire letter (including the address) aligned on the left side and has single spacing between lines and a double space between paragraphs. Sometimes the punctuation is open. That means there is limited punctuation outside the wording of the letter itself. Some organisations use a mixed punctuation style, which means they place a comma after the greeting and the close.

Here are the parts of a business letter.

Date

The convention in Australia is to write the day, month and year; for example, 12 May 2016.

Sender's address

This is not necessary if your organisation uses letterhead paper.

The name, title and address of who you are sending the letter to

If you do not know the title of the person, you should try to find out; if you are unsure how a woman prefers to be addressed, use Ms.

The greeting

This is sometimes called the salutation. This is usually 'Dear', followed by the same title and name as used in the inside address. If you are not sure of the person's gender, write their full name; for example, 'Dear Pat Smith'. If you do not know the name of the person, you may have to write 'Dear Sir/Madam'.

Body

This is the main content of the letter. You should consider a friendly opening and then state the main point of the letter.

Close

In a business letter, the formal close is 'Yours sincerely' if you know the name of the person you are writing to, or 'Yours faithfully' if you do not.

Signature and identification

This is usually about six spaces below the close. After the signature is the sender's name and position in the organisation (the position is usually in bold).

Other parts of a business letter

Other parts to a business letter might include enclosures, which are the items attached to the letter such as references, cheques or brochures. You write 'encl.' and the number beneath the sender's identification. Beneath that again you may have to write 'cc' (meaning 'copies') and the name of anyone to whom you have sent a copy of the letter.

Most organisations also require a reference line at the bottom of the letter, which links to the organisation's electronic file or paper records, or the person who has prepared the document.

The most common font for business letters is Times New Roman, size 12 point. If the letter is very short, you may wish to use 1.5 line spacing to spread the text out more evenly over the page. If your organisation does not have its own templates for letters, see if there are any templates available in your word processing software.



Business faxes

Faxes can be used to transmit business correspondence. You may be able to send a fax using a fax machine or directly from your computer. Your document has less chance of getting lost this way than sending a document by post. However, it is not as secure because, if you are not careful, your fax may go to the wrong number and could be read by the wrong person. It might also go to a fax machine that is located in a busy part of an office, and could be read by someone who is not the intended recipient. Faxes must have a cover sheet, which gives the fax number and name of the recipient and the sender, the date and the number of pages being sent. The message on this cover sheet is usually brief and tells the recipient the purpose of the fax.

Your organisation may have an electronic fax template or a standard form that must be used when you send a fax. On the fax cover sheet, include the organisation's details and a brief message. It is also important that you indicate the number of pages you are sending, so the recipient can check they have received all the information.

Example: completed fax

East Asian Artefacts

Facsimile

To: Oriental Boutique

Attention: Mr Chau

Fax: (04) 3688 1234

From: Bernie Periera

Date: 5 June 2016

Subject: Price list

No. of pages: 3 (incl. cover page)

The following pages provide details of the prices and sizes of the desks, as per your request.

Delivery would take about three to four weeks.

Thank you for your inquiry.

Regards

Bernie

Ph: 8544 1255

Business memos

A memo is a popular format for sending information in an office. Memos are usually sent when information needs to be forwarded to a number of people or if a record of correspondence is required for future reference.

The subjects of memos might be:

- general announcements about staff policies, safety procedures or social events
- correspondence between a manager and staff about leave applications or performance appraisals
- correspondence between teams or departments about time lines and new projects
- short reports to staff about decisions made by team leaders or managers.

The structure of business memos

Many organisations have their own memo template.

The usual parts of a memo

- To – the name of the person or department the memo is being sent to
- Cc – the name of anyone who should receive a copy
- From – the name of the sender
- Date – the date when the memo was sent, which is important as a memo may take a little while to get around to various people in the office
- Subject – similar to the subject line in an email, this should be a brief few words saying what the message is about
- Message – the message in a memo is not set out like a letter. It does not have a salutation or a close. If your organisation does not have a memo template, check your word processing program for one

Example: an office memo

Memorandum

To: All staff
Cc: Mr Jones
From: Robert Smith, Office manager
Date: 21 July 2016
Subject: Car park

The car park will not be available on Monday 25 July as maintenance work is being done to correct the surfacing.

Please be sure to make alternative arrangements for parking. The building next door has advised that they have several spare parks, but you will need to call them by 5 pm today.

Please let me know if this will cause you any difficulty.

Business emails

Emails are sent when you want to relay a message quickly. In some organisations, emails are more common now than memos or faxes. They can be sent within the organisation or to external clients. Like faxes, they must be addressed accurately.

There are communication protocols for business emails. Usually emails should be formal, even though you may know the person you are emailing very well. In business, your email could be forwarded to someone else, such as the recipient's manager, so an informal style may not be acceptable.



Example: the language of emails

Look at the following email message. Although it gets the message across, it is too informal for a business email. Joe may need to pass this on to the marketing manager. This type of language is more appropriate for your personal emails.

Send	To...	joblow@bigpond.net.org
	Cc...	
	Subject:	

Hi Joe. How are things with you these days? Could you let your marketing branch know that we received their information? It was spot on. Cheers. Costa

The following email message would be more suitable, even if Costa knows Joe quite well.

Send	To...	joblow@bigpond.net.org
	Cc...	
	Subject:	

Dear Joe

Please let your marketing branch know that we received their information. It was very helpful and included exactly the information required about prices, deadlines and ordering procedures.

Regards

Costa

The structure of business emails

Most email features are similar, regardless of the software program you are using.

Parts of an email include:

- To – on this line, you type the email address of the recipient; you must be very careful about this address as even a small mistake will mean the message will not be received
- Cc – on this line, you type the email address of anyone who needs to receive a copy of your email; for example, your manager
- Bcc – on this line, you type the email address of anyone who needs to receive a copy of your email, but whose email address you do not want to have appear in other recipient's copies
- Subject – on this line, you should give an indication of what the email is about; this should be brief and to the point
- The remaining space is for the email message

The layout of an email

The layout of an email should be the same style as a letter – starting with a greeting such as 'Dear', followed by the name of the recipient and then the message. The message should have a space after the greeting and between paragraphs for easy reading. The close and signature should be as for a letter, though you may set up an automatic signature on your computer. Some organisations have a specific style that all employees must use for the signature, including the person's title, position, company address and a confidentiality disclaimer in the case of someone receiving the email by mistake.

The font requirement for an email is different to a letter. A sans serif font should always be used for any text that is read on screen. Arial font is a good choice for an email.

Example: business email

The image shows a screenshot of an email client window. On the left side, there are several labels in blue text with lines pointing to specific parts of the email interface:

- Recipient's email**: points to the 'To:' field containing 'constatine@cbda.com.au'.
- Copy to**: points to the 'Cc:' field containing 'gboots@efgh.com.au'.
- Subject**: points to the 'Subject:' field containing 'Replacement request'.
- Greeting**: points to the text 'Dear Mrs Constantine'.
- Body (content)**: points to the main text of the email, which includes an apology, a replacement offer, and a discount.
- Closing**: points to the text 'Yours sincerely'.
- Sender's identification**: points to the signature block, which includes the name 'Jocelyn Wong', title 'Manager', and contact information for 'Jewels Galore'.
- Disclaimer**: points to the small text at the bottom of the email, which is a confidentiality notice.

The email content is as follows:

To: constatine@cbda.com.au
Cc: gboots@efgh.com.au
Subject: Replacement request

Dear Mrs Constantine

Please accept our apologies for the unsatisfactory goods you received. We are sorry the goods arrived in such a state.

I have dispatched a replacement set to you by courier today. As well, we wish to offer you a discount of 20% off your purchase. A new invoice will be in the mail next week.

Again, please accept our apologies.

Yours sincerely

Jocelyn Wong
Manager
Jewels Galore
15 Trent Avenue
Westoun 4909
Email: jwong@jewelsg.com.au
Phone: (09) 7891 2345

This e-mail is intended for the use of the addressee only and may contain confidential information. If you are not the intended recipient, you are hereby notified that any use or dissemination of this communication is strictly prohibited. The sender disclaims liability for any errors, omissions, viruses, loss and/or damages arising from using, opening or transmitting this email. If you receive this transmission in error, please Jewels Galore immediately on (09) 7891 2345 then delete this email.

Agendas

An agenda contains details of where and when a meeting is to be held and a list of the items to be discussed at the meeting. Some agendas list the names of the people who will speak to each item. The agenda is given to all those invited to the meeting in advance, so they can prepare any papers or thoughts they may have on any items that will be discussed at the meeting.

Most organisations have a preference for how their agendas are to be set out. If you are new to an organisation, ask if there is a template you should use or you could copy an agenda from a previous meeting.

Example: agenda for a staff meeting

Reynard Real Estate Staff meeting

Date: Tuesday 2 April 2016

Time: 2 pm

Location: Board room

Agenda

Chair: Doug Kosovitch

Minutes: Shelley Andersen

- Apologies
- Minutes of the previous meeting
- Business arising
- Correspondence – Darren
- Financial report – Craig
- Sales report – Wendy
- Forthcoming auctions – Joseph
- Promotional activities – Erica
- Other business

Next meeting: Tuesday 9 April 2016

Minutes

Minutes formally record what happens at a meeting. Minutes are generally set out in the order of items as outlined in the agenda. They must be a clear and accurate account of what was said at the meeting, who reported each item and of decisions that were made about any action to be taken and who would be responsible. They can be an important record for the organisation.

You will need to find out what your organisation requires in its minutes.

Generally you must record:

- the date, place and time of the meeting
- who was present at the meeting
- who sent an apology for their absence and who was absent without an apology
- note whether the minutes of an earlier meeting were accepted as being true and correct
- notes about the discussion on any agenda item
- notes about what action is to be done and by whom
- the date, time and place for the next meeting.

Forms

You may be asked to prepare forms such as surveys, questionnaires, customer satisfaction sheets or customer complaint forms. Your organisation may have developed templates for these; however, it may be your responsibility to write the specific content.

Reports

The longest documents you may come across are reports. Reports can be annual reports for the organisation, research reports or feasibility reports. They are usually very formal documents. Most organisations have a standard structure for their reports with headings that you must address and styles you must use. For example, some organisations require reports to use a complex hierarchical numbering system. Take note of the format required by your organisation. Many reports incorporate visual devices to make them more readable. These devices include the use of headings, lists and keywords. Important information or text may be repeated in break-out boxes for emphasis.

Generally a report should include:

- a title page
- a table of contents – this should reveal a logical flow of information
- a list of tables or graphs if necessary
- a summary of key points (sometimes called an executive summary)
- an introduction
- the main text
- a conclusion
- a list of recommendations, where appropriate
- references and acknowledgments, if necessary
- appendices, if appropriate.

Research information

Reports are important documents and must be accurate, relevant and appropriate to the needs of the audience. A report involves gathering and relaying information. The first step is research. Before you begin a report, you need to ascertain the time lines for producing the report, the audience and the information required.

Information for the report may come from:

- the organisation's databases and files
- people who know something about the subject of the report
- memos and other reports in the organisation
- libraries
- newspapers
- the internet.

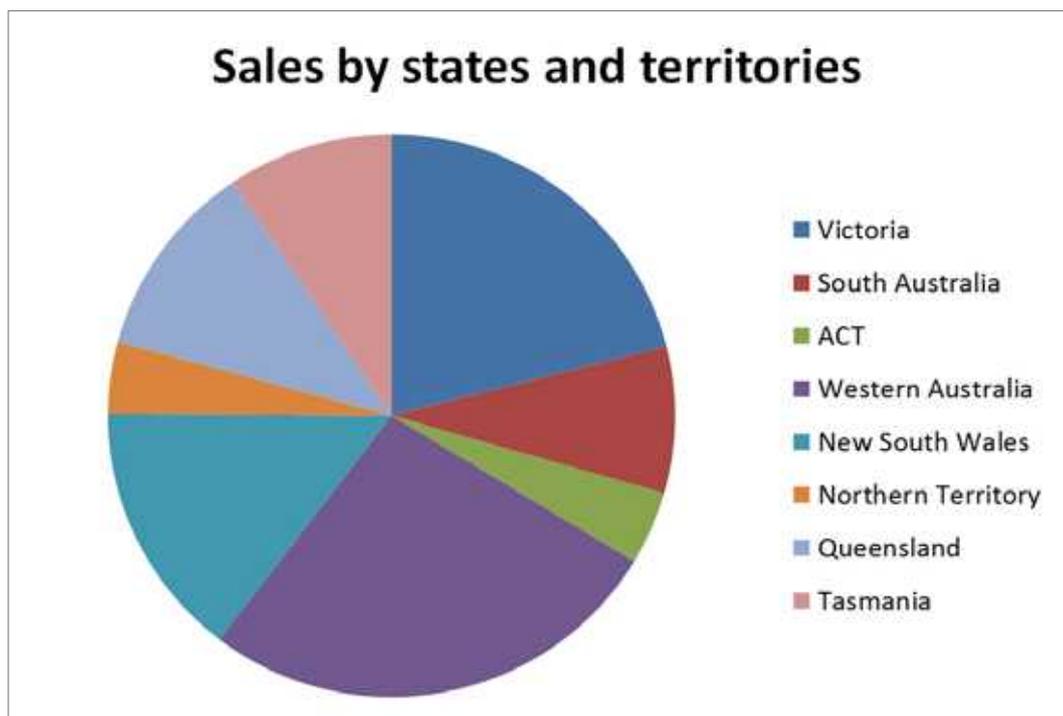
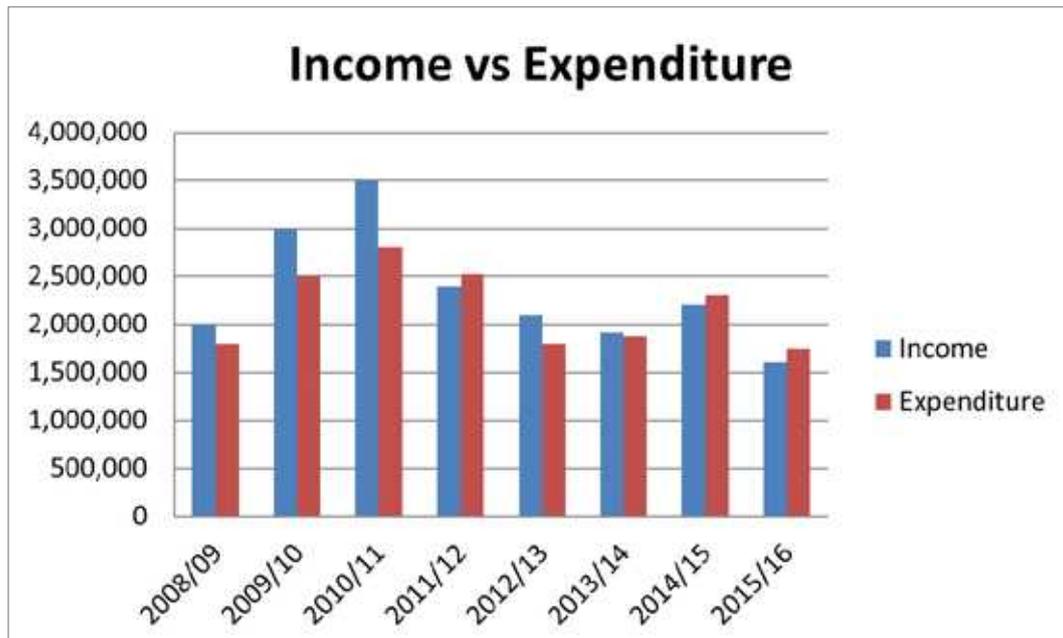
Use tables and graphs

Many reports include tables and graphs that summarise information. Tables and graphs can show such things as percentages, growth and sales figures more clearly than text. Tables and graphs must have a title that summarises what the table or graph is illustrating. Most software programs can generate graphs such as pie charts or bar graphs.

The effectiveness of a graph or chart can depend on:

- the kind of graph you choose
- the use of colour and shading
- where you place the text
- your choice of font and font size
- the size of the graph
- whether you use a portrait or landscape page layout.

Example: graphs used in reports



Presentation documents

Presentation documents can include brochures, notices, advertisements and screen display presentations such as Microsoft PowerPoint presentations. Such documents need a great deal of thought because they must be attractive, clear and concise. Many software programs are available that make producing such presentation documents easier.

The structure of presentation documents will vary but there are some features you need to remember:

- If the document is to be presented on screen, you should use a sans serif font (for example, Arial) and the smallest font size should be 28 points.
- Don't have too much text on one slide and use plenty of space.
- Each slide should only contain the main points, not the full text, of what the person presenting wants to say.



Intranet and internet documents

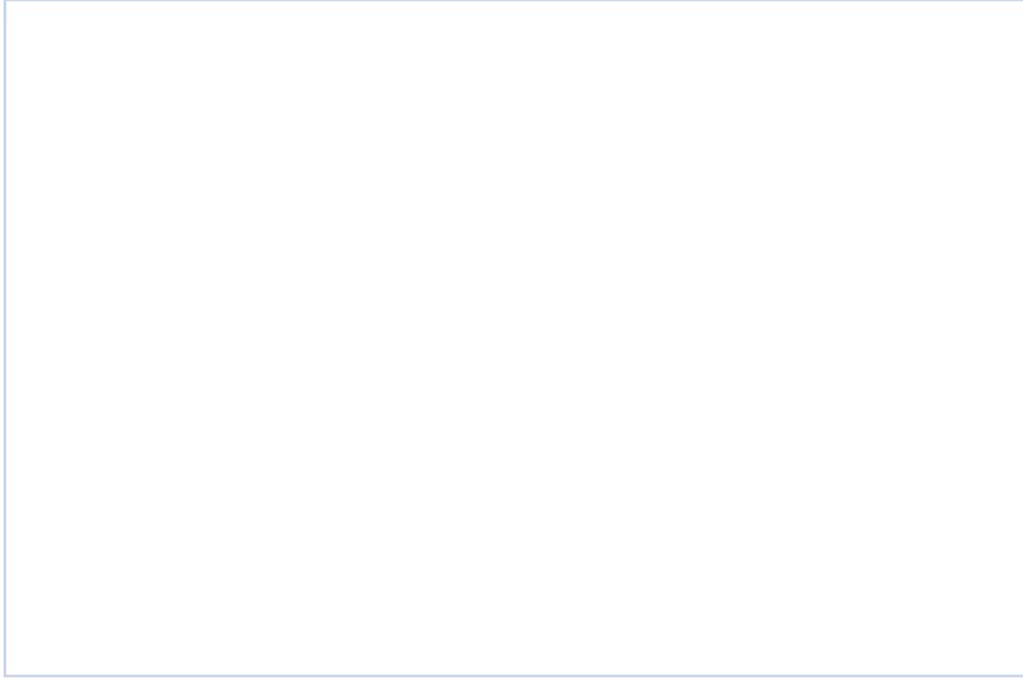
In your organisation, you may need to access on-screen documents. This may be via the intranet (internal internet), which can only be accessed by employees and other authorised people, as well as the internet. Here are the main things to remember about on-screen document requirements.

On-screen document requirements

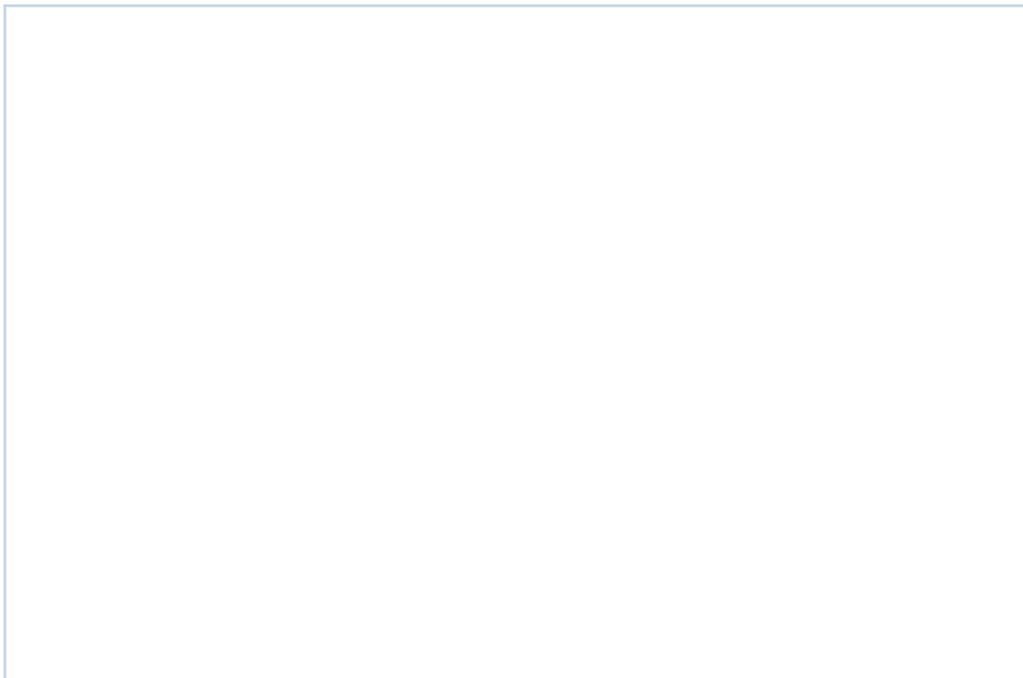
- Any on-screen text should be in a sans serif font; for example, Arial, Tahoma
- Writing style should be clear, concise and in plain English
- Screen readers are software applications that identify and interpret what is being displayed onscreen, so ensure your message is clear
- Avoid long pages of text that the reader has to scroll down
- Provide useful, hyperlinked navigation icons, such as links to headings and back buttons

Practice task 2

1. Look at two different business letters you have received. They could be from a bank, your dentist, your employer, a shop or a club – any letter other than a personal letter. Compare them against business letter requirements in this unit – note which features are present in your business letters.



2. Try to find some material that contains graphs and/or tables. If you are employed, find these within your organisation. If you are not employed, you can sometimes find these on the business pages of newspapers or magazines such as Business Review Weekly or The Australian. How well do the graphs convey information? Do you think they are easier to understand than if the information was presented in written form?



1C

Establish key points for inclusion

You know the purpose of the document you are going to write, you know the audience for the document and you know what format you will use and the structure of that format. Your next task is to work out exactly what it is you need to say in your document. What precisely will your document contain?

Ask yourself why the readers will be reading your document and what it is they need to know. If you are clear about that, you will know how much to include. For example, if you are writing a report, how much do your readers already know? Do you need to provide some background information or not?



Start on a document

One way to start on any document, no matter how short, is to briefly make a list of the main things you want to say. If it is a large document, these main points might be your headings. You may then want to write smaller related points under them.

Then put these key points in a logical order. Consider whether these points will cover all you need to say. Are there points you don't really need to include? If so, delete them. Is there anything the reader needs to do after reading the document? If so, is that one of the points that is listed? You may need to check your list with your supervisor to see that you have covered everything.

Practice task 3

Read the case study and respond to the questions.

Case study

Mandy works in a school office. The school principal, Mr Collins, asks her to send a letter to Mr and Mrs Jones requesting that they make an appointment to see him. He is available any day other than Thursdays. Mr Collins is concerned that their child, Sally, had complained to the teacher that she was being bullied; however, Sally will not give the name of the offender.

Mr Collins wants to know whether Sally has reported any incidents of bullying to her parents or whether they have noticed any change in her attitude to school. He does not tolerate any form of bullying in the school and wants to get to the bottom of the matter, so he would be grateful if Mr and Mrs Jones could make time to meet with him.

1. Make a list of the main points that Mandy needs to cover in the letter.

2. Write the main section of the letter (don't worry about the address, etc).

1D

Identify organisational requirements

Most organisations have specific requirements, or communication protocols, regarding the way their documents are prepared. When you are designing a new document, you should always take into account the communication protocols set down by your organisation. This is often referred to as a house style. By conforming to a preset style, an organisation can guarantee that all the documents it produces will have a consistent appearance.

The house style

The house style may be clearly set out in a style manual.

The style manual may tell you:

- what templates to use for specific documents; for example, a set style for footers, headers, fonts, margins, etc. so that all documents look the same
- the software program to use
- the preferred fonts to use
- the heading styles
- the kind of language to use – formal or informal, active or passive, or inclusive (for example, non-gender specific)
- the specific styles to follow (for example, abbreviation styles, whether to use ‘eg’ or ‘e.g.’, when to use capital letters, margins and line spaces).

Organisational procedures

Your organisation may have specific procedures regarding its electronic and paper-based documents. There may be a procedures manual that tells you what computer software is used, how to use it and what to do if you have problems with it. For example, you may be required to:

- document your work with a file name, author and path in the footer of each document
- make regular back-ups so that a document is not accidentally lost
- report any problems you have with software to the IT officer in the organisation.

Other organisational requirements may include:

- protocols for external and internal communications, including requirements for inclusive and non-discriminatory language
- information relating to who is allowed to sign various documents; for example, whether you are authorised to sign letters over the manager's name
- considering copyright; for example, how you acknowledge any material you have copied in a document, whether you need to seek copyright permission and how you would do so.

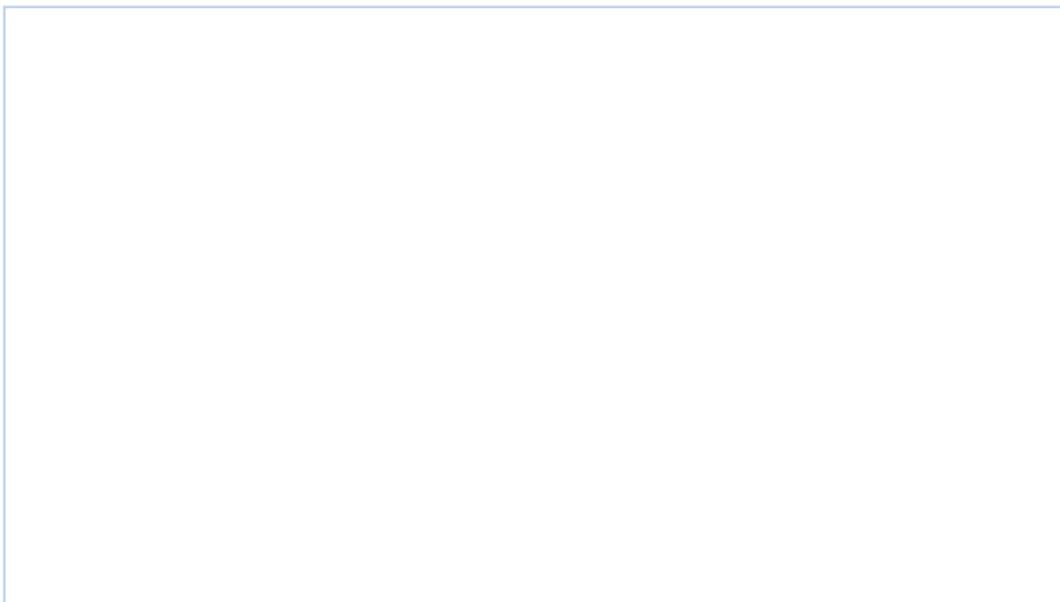
Policies for relaying information

Your workplace may have specific policies for relaying written information. Some large organisations have an internal mailing system in which written information is collected and distributed at set times in the day. There may be specific times for collecting documents to be sent externally. There may also be particular procedures for relaying certain types of information; for example, written information may be passed on by putting it in a person's in-tray on their desk or perhaps in a pigeonhole.

You may also be given designated time lines for producing documents. Sometimes you may be expected to produce a document by a certain time and date. You may have to produce regular documents such as meeting agendas that have to be given to the relevant people before the meeting day. In other cases, you may be able to use your judgment.

Practice task 4

If you are employed, find out whether your organisation has a style manual. If so, take a look at the kinds of details it provides. If you are not working, try to access a copy of a style manual from a local or public library. Summarise the kinds of details it provides.



1E

Establish method of communication

To identify the most appropriate method of communication, you need to ask yourself these questions.

Conversation questions:

- Is the document for a formal situation (i.e. to be presented to management or a board)?
- Is the document a formal letter to a client?
- Is the document an informal document, such as a memo reminder to staff or an informal email about a staff social event?

The style of your communication

Your first decision about the method of communication you use will be whether it is appropriate to use a formal or informal style of communication. Most business documents will be in a formal style. For example, although you may know the customer to whom you are sending an email very well, most organisations expect you to send emails that address the recipient formally and to close formally.

If the email or intranet message is about an informal occasion for the staff, then you can use an informal style. Remember to make the language in the message non-discriminatory, inclusive and polite.

Memos should also be formal and to the point. Informality in instructions can sometimes make the instruction appear unimportant. If the memo contains important information, such as work health and safety (WHS) advice, a formal writing style gives a sense of importance to the message.



Passive and active language

Documents such as reports are always formal, even if you know the people you are writing for. Formal language does not mean passive language. Wherever possible, you should choose to write in active language, which means you mention the person who is doing the action first. The meaning is then much clearer to the reader. The examples below clearly show the difference between passive and active language.

Passive and active language

Passive: The report was written by John Smith.

Active: John Smith wrote the report.

Passive: The material you ordered was sent to you by our city branch.

Active: Our city branch sent the material you ordered.

Passive: The annual report was discussed by the Board.

Active: The Board discussed the annual report.

Inclusive language

Your language must also be inclusive. This means writing for all types of people. No-one must feel that you are excluding them in what you have written. For example, don't make assumptions about the gender of people in specific jobs. If you are writing to a manager, don't assume it is a man or that a receptionist is a woman.

Don't assume the people reading your document will be of the same gender, ethnicity or ability as you. Instead of using 'he' or 'him', use 'he or she' or the plural pronoun 'they'. Most places prefer the plural use, but you will need to find out what style your organisation prefers.

Be careful not to use discriminatory language such as demeaning terms like 'girls' for 'women' or unnecessarily imply gender to roles such as 'chairman' instead of 'chairperson' or 'chair'.

Practice task 5

1. Turn the following sentence into an active sentence:

A pay rise was announced by the manager, to take place immediately.

2. Choose any business document from your workplace or a business document you have received in the mail. Circle the sentences that are passive. (You are almost certain to find some!) Rewrite them in active language. Does this make the meaning clearer?

1F

Establish means of communication

In many instances, your organisation will have a number of software packages for you to use when preparing documents. These software applications perform specific tasks such as:

- word processing
- creating databases
- creating spreadsheets
- creating presentations
- writing and sending emails.

Common packages include Microsoft Office, InDesign and Adobe Creative Suite. Microsoft Office products include Microsoft Word, Microsoft Excel, Microsoft Access and Microsoft PowerPoint. Some organisations have customised software for their specific use. You should find out what software is available in your organisation.

You may have to decide which software application is the most appropriate to use. That, of course, depends on the document you are creating. Sometimes you will be word processing, while at other times you may have to enter numbers or calculations into a spreadsheet or details into a database.

The uses for common applications

Here are the main uses for common applications:

- Word processing applications are used for documents such as letters, memos, reports and simple tables.
- Spreadsheets are used to produce documents such as budgets and monthly sales graphs. Though word processing can be used for a great number of documents, spreadsheets can do more. A spreadsheet is divided into cells, each of which can have text, and/or values, and/or formulas. The spreadsheets can make calculations based on the values. The spreadsheets have many rows and columns.
- Databases store information such as customers' names and addresses, personnel details and buying records.

Choose software

Sometimes you have to choose between word processing and spreadsheet software if you are producing a table in your document. Here are examples of the appropriate software to use for various documents.

Reports containing mainly text

└ Word processing software

Reports containing mainly figures

└ Spreadsheet software

└ Accounting software

Letters and memos

└ Word processing software

└ Desktop publishing software

└ Digital image editing software

Reports containing mainly text

└ Word processing software

Client and product details

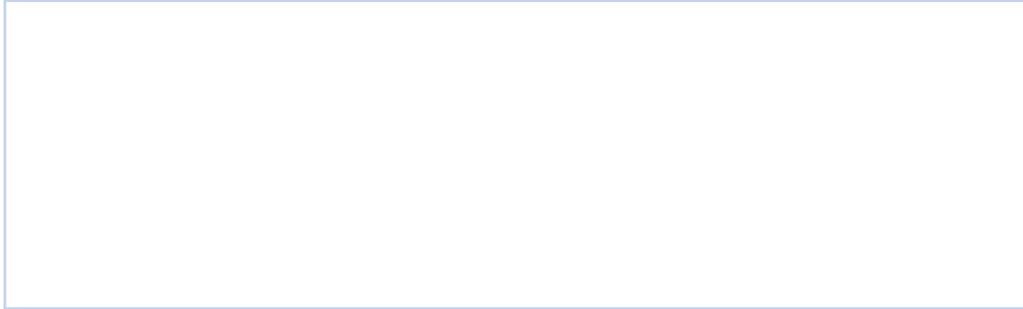
└ Database software

└ Spreadsheet software

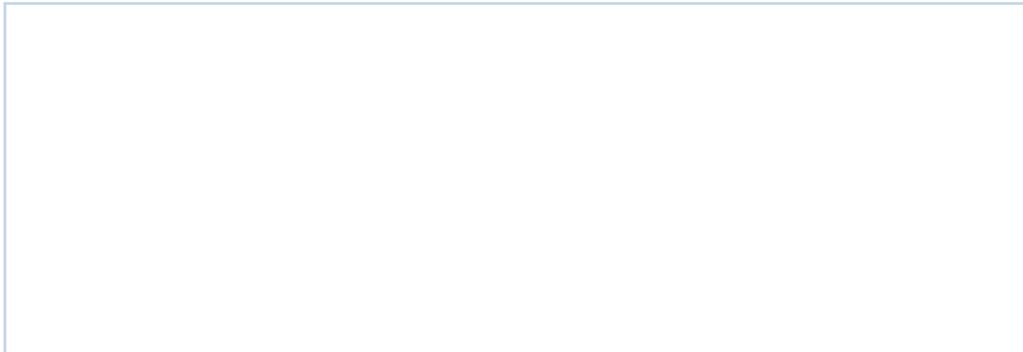
Practice task 6

Think about the software applications with which you are familiar.

1. Do you have access to these at home or at work?



2. What do you produce from each type of software you use?



Summary

1. Documents used to communicate information in a business include letters, faxes, memos, emails, briefing papers, agendas, minutes, reports and financial spreadsheets.
2. Business documents that store information include databases of clients' names and addresses, responses to questionnaires and product records.
3. Every document you prepare requires preparation before you begin writing.
4. Decide on the purpose of your document and the key points it must contain.
5. Identify who you are writing for.
6. Being clear about the purpose and audience for your document will help you decide the type of document you will create.
7. Every type of business document has a particular format and structure that you should use.
8. Specific formats and structures of business documents may be required by an organisation.
9. Many businesses have software packages for you to use to create your documents.

Learning checkpoint 1 Plan document

This learning checkpoint is designed to confirm your skills and knowledge in planning a document.

Part A

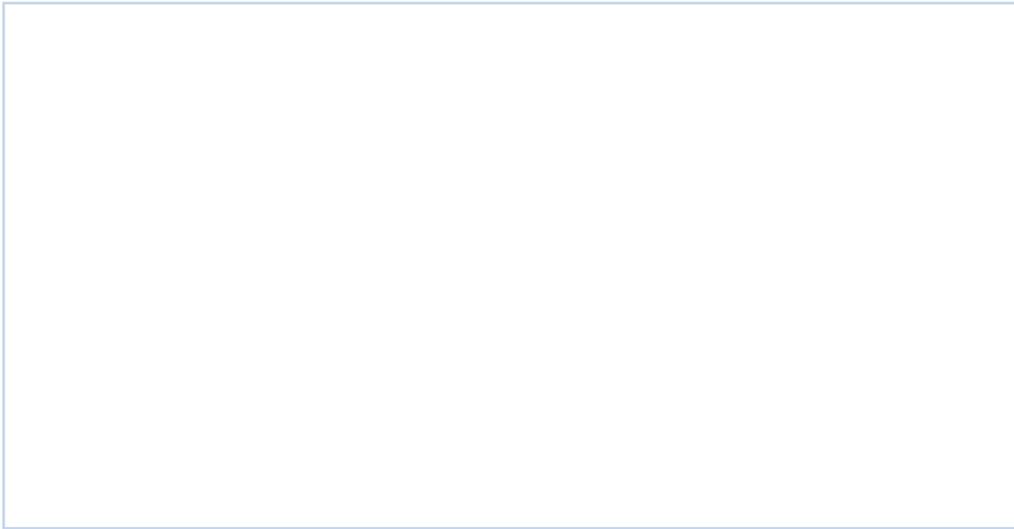
Choose any two business documents. For each document do the following:

1. Describe the format of the document and its structure.

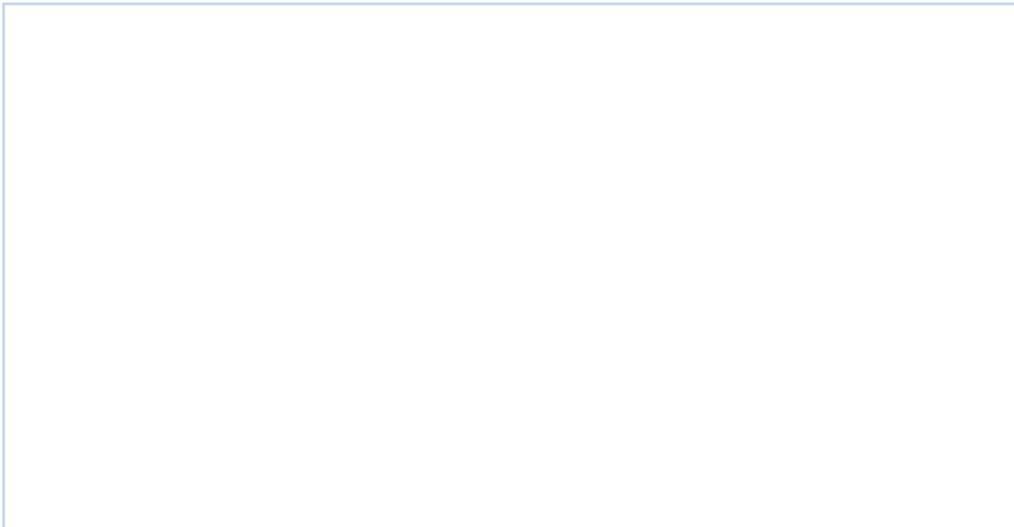
2. State its exact purpose.

3. State the document's audience.

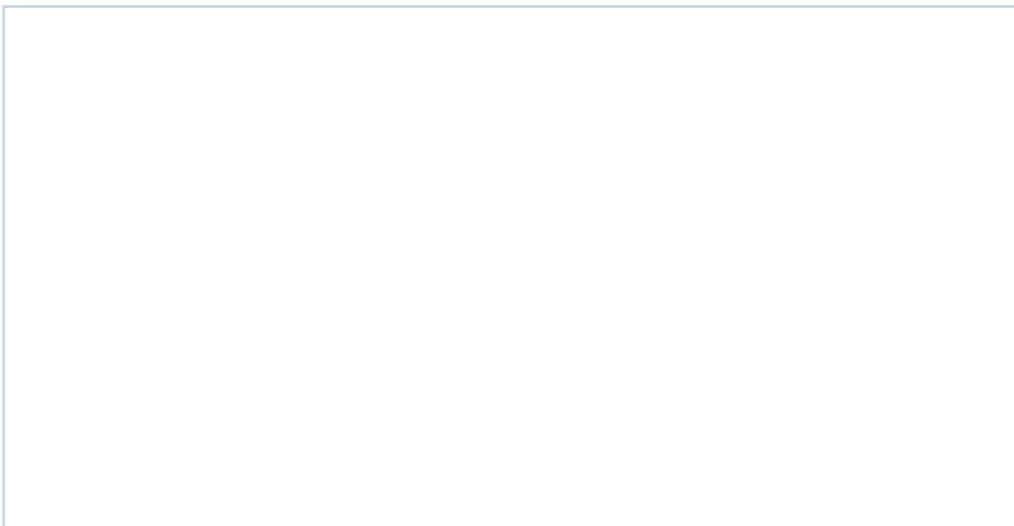
4. Explain what communication method has been used.



5. State what means of communication was used.



6. Identify the type of software package used.



Part B

Read the case study. Write down your responses to the tasks.

Case study

The director of a not-for-profit company has asked each team to provide her with a report on customer feedback they have received over the past three months. She especially wants to know:

- the types of complaints made
- whether the complaints are from regular or one-off customers
- the types of compliments received
- the types of suggestions given
- how the feedback was collected
- the demographic details of the customers such as postcodes, age groups and gender groups.

Recommendations for improving customer service are also to be included in the report.

Each team's report will feed into an overall organisational report that will be given to board members. Your supervisor gives you the task of preparing a draft report for your team.

1. State who the audience for your document is.

2. Explain the purpose of the document.

3. What is the communication format to be used for your document?
Provide details.

4. Make a list of the key points you would need to include in the report.

5. Decide on the communication style you would use and explain why.

6. What organisational requirements might this business have that you would have to follow?

7. What software package would you use?

Topic 2

Draft document

Once you have established the type of document you are going to prepare and you have identified who it is for, what it will look like and what you are going to say, it is time to start writing.

An important part of the writing process is planning and then developing a draft of your document. By developing a draft of your document, you can establish your key points and ensure you have included all the necessary information before your work is finalised.

In this topic you will learn how to:

- 2A Develop draft document to communicate key points
- 2B Obtain and include any additional information that is required

2A

Develop draft document to communicate key points

Although this is only a first draft, you should think about how you will structure the document so the information is presented logically. Most documents, even short ones, should include:

- an introduction describing what the document or message is about
- the main text, which has the sentences and paragraphs describing the details of the information
- a conclusion summarising the key points and indicating any outcomes, recommendations and actions to be taken.



Start writing

A good way to start writing is to put your key points into sentences and paragraphs straightaway. At this point, don't worry too much about whether or not you have used exactly the right wording or punctuation. Remember this first writing attempt is only a draft – you have a long way to go. It is not the finished product. Put everything you think you need to include down on paper. Don't try to make it sound perfect as you do this or you will lose the flow of your thoughts. Perfecting the draft comes later.

As you write, remember who your audience is. Remember the purpose of the document. When people receive information, they need to be able to understand the information and know what they are supposed to do with it.

Then check that you have included all your key points and not omitted anything important.



Do an initial edit

Once you have let your thoughts flow freely and written down all you need to say, it's time to do your first edit or check of the material. There are a number of things you should look at. These include looking at the words you have used, the length of the sentences, the way you have expressed yourself and whether there are any spelling mistakes. Use this information to see how well your document is progressing.

Checking document progress

1

Does the document have a clear beginning, middle and end?

The first sentence should let the reader know exactly what your document is about. For example:

'Here are the prices and options you asked for.'

The middle of the document should include your key points. This may be only a few sentences or, in the case of a report, may be quite lengthy.

The end of the document should sum up your message clearly. For example:

'Thank you for your inquiry.'

2

Have you remembered to write using active language?

Remember to begin with the person who is doing the action.

Passive: 'A new system for processing leave forms was announced by the manager.'

Active: 'The manager announced a new system for processing leave forms.'

3

Are the points in a sensible order?

Do the points follow on from each other in a logical order? Look at this example. How would you change it?

1. We will discuss the new payroll procedure at the meeting.
2. In July, we will introduce a new payroll procedure.
3. The meeting will take place at 10 am on Monday.

4

Have you written in plain English?

Important sounding words are not necessarily the best words to use. For example:

'The report will be utilised in the decision-making process' really means 'The report will be used to make decisions.'

5

Look at the length of your sentences. Are they all the same length?

Varying your sentence length makes a document more interesting for the reader. For example:

'On Thursday 15 August we are organising an emergency fire drill. There will be a meeting at 9.30 am on Monday to describe what you need to do and how the drill will operate. Everyone must attend. Please read the attached overview so you are familiar with what is required. See Rachel if you need further information.'

6

Are the sentences too long?

Sentences should only have one main point. For example, this sentence is far too long and contains too many ideas:

'The work health and safety audit that was recently conducted at our office by external consultants Winslow & Abbot, showed that we are on track and are meeting our legislative requirements, especially in the area of storing hazardous material, although it highlighted a number of areas in which we need to improve, such as stacking boxes too near the fire exit and not covering loose computer cords in walk areas.'

7

Have you repeated words?

Think about using alternative words. Use a thesaurus to check for suitable synonyms for words you may have used repeatedly. For example, are there other words you could substitute for 'customer' in the following sentence?

'The customer feedback we recently received from a number of customers highlighted the importance of satisfying customer needs.'

8

Have you used too many adjectives and adverbs?

Overusing adjectives and adverbs (such as usually, very or quite) can lead to unnecessarily long sentences.

Look at this example. How would you change it?

'It is quite a good idea to ask customers to fill in a feedback form because quite a few of them have interesting useful suggestions. If we have quite a number of similar comments our marketing staff would find this quite useful.'

9

Have you said the same thing more than once?

Repeating information can make a sentence longer than it needs to be. How would you rewrite the following sentence?

'We request all staff members to sign the time sheet each day. You should arrive at work on time and sign the time sheet. The manager has requested this.'

10

Check the number of times you have used 'that'.

Many of these can be deleted. For example, they can be deleted in this sentence:

'The manager found that he could not contact the client by phone, so he thought that it would be a good idea to write a letter instead.'

11

Do an initial spelling and grammar check, using your software's spellcheck function.

In the following sentence, three errors were highlighted.

'The manager aksed the receptioist to gave the report to her.'

Mistakes in spelling will be underlined in red (for example, 'aksed' and 'receptioist'). Any grammar mistakes will be underlined in green (for example, 'gave').

Checklist for a draft document

Use the checklist below when you need to check a document you have drafted.

Draft document checklist

- Does the document have a clear beginning, middle and end?
- Have I remembered to write using active language?
- Are the points in a sensible order?
- Have I written in plain English?
- Is the length of my sentences varied?
- Do the sentences have only one main point?
- Have I used alternative words instead of repeating words over and over again?
- Have I used an appropriate number of adjectives and adverbs?
- Have I written something only once and not repeated it?
- Have I only used the word 'that' when necessary?
- Have I done an initial spelling and grammar check, using my software's spellchecker?

Use features

If you are inserting any tables or graphs, check you are using the best formatting possible. The way tables, graphs and spreadsheets are formatted can affect their appearance and how easy they are to read or use. However, don't spend all your time formatting. It's easy to waste time experimenting and trying to change the look of a table or chart by fiddling with the shading or bullet points. Look at documents that other people have prepared and see what type of formatting they have used.

Now look at your draft document. Are the graphics easy to read and clearly presented? Are there too many bullet points? Does a chart have too many different parts to it? The rule is: keep it simple.



Prioritise tasks and workload in draft document preparation

The final quality of a written document can be influenced by your workload. Preparing quality written documents requires that you prioritise and allocate sufficient time. This may be challenging in a work environment where you have other priorities and time pressures.

How you organise your daily work activities and routine tasks is the first step in creating an environment where you can write effectively. A daily work plan will not only allow you to improve your level of organisation for implementing routine tasks, but it will also improve your level of organisation for preparing and writing documents. There are five main steps that need to be followed when planning, organising and implementing routine work tasks.

- 1** Identify the tasks to be completed.
- 2** Assess the time and resources needed to complete the tasks in line with organisational parameters, such as work procedures and quality manuals.
- 3** Prioritise tasks in order of importance.
- 4** Estimate and continually update your time lines.
- 5** Communicate issues relating to your workload clearly and effectively with other team members as needed.

Practice task 7

1. Think about anything you have written at work or when studying. Did you try to write it slowly in the belief that this was going to be the first and only copy? How successful was this approach?

2. Why do you think the advice to just write down everything straightaway could be a good strategy?

2B

Obtain and include any additional information that is required

When you have finished the initial rough draft, you need to look it over and see whether you need more information. Is there anyone else you should have spoken to? Have you used all the sources available? Did you use the most reliable sources?

Perhaps you need to find the final or more up-to-date figures for a table or graph. Imagine the kind of data that businesses might need. What mistakes could be made, or what could happen, if the information was out of date? If you have quoted what someone said, you may need to check the accuracy of your quotation. If you are sending out a memo from your manager, you may need to check that you have the right dates for a meeting. If you are writing a meeting agenda, you may have to check that a person designated to give a talk is actually available on that day.



Review gathered information

As you write the document, you should review it. Check that it is accurate by asking someone else to verify what you have written. Also check that the information is up to date and relevant.

Delete irrelevant material and look for gaps. Is the material comprehensive? Is any of the material unclear? Would a table or chart help to make the information clearer? These are the sorts of questions you may ask as you read through your document.

Use this checklist to verify that you have checked the information in your document.

Document review checklist

- The information is current.
- The information is relevant.
- The information is accurate.
- The information is clear.
- All appropriate resources have been consulted.
- Resources were reliable and unbiased.
- Graphics have been included where appropriate.
- Formatting has been kept to a minimum but used effectively.

Take a break

Unless the document you are writing is urgent, the next thing you should do is put it down. Do something else for a while before you do a detailed review of your draft. You need to have a fresh look at what you have written and to do that you need a break from it. If it is a long document, such as a report, try to leave it for the next day. When you look at the draft again you'll be surprised at what you missed the day before!

Practice task 8

1. Develop a checklist you can use to review all documents you create in your position.

2. Use the checklist you prepared for question 1 to check a document draft you have recently completed in your workplace.

3. How could you make improvements when checking workplace documentation?

Summary

1. After planning your document, write a draft straightaway – get down everything you need to include and be aware that it is only a rough draft.
2. Your first self-edit should include checking whether you have used active language; whether the length of your sentences and paragraphs vary and are mainly short; whether you have repeated words; and whether you have conveyed the information clearly.
3. Use the software spellchecker for spelling and grammar errors. Check for spelling manually as well.
4. Check whether you have used any special features, such as tables or graphs, effectively.
5. Check whether information in your document is accurate, up to date and relevant.

Learning checkpoint 2 Draft document

This learning checkpoint is designed to confirm your skills and knowledge in drafting a document.

Part A

Read the case study. Write down your responses to the tasks.

Case study

You work for a clothing manufacturing company called Marcia Clothing, situated at 106 Williams Road, Merryville, VIC 3288.

You have received a letter from a store, Fry's Boutique, requesting a copy of your current catalogue and some details of your summer range. It seems that Fry's Boutique has not made orders with your company before so you need to ask whether they would like a sales representative to visit them.

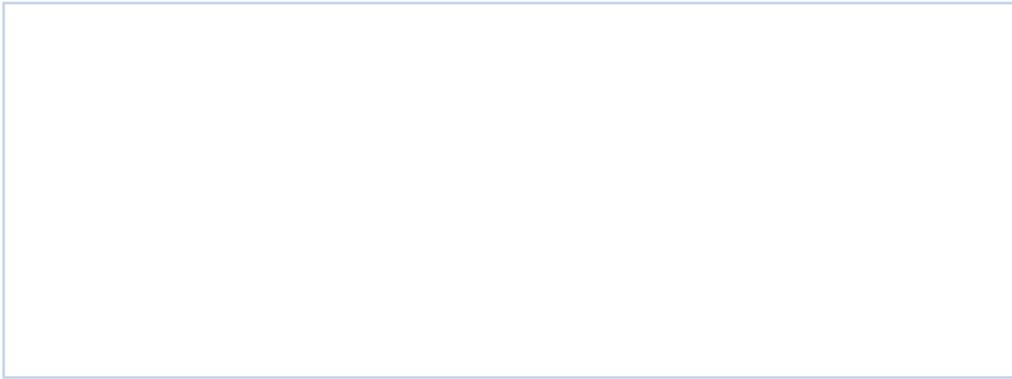
The letter is dated 16 June 2016. Their address is 19 Harpers Road, Melbourne, VIC 3000.

You find out that the summer range includes a lot of dresses and that the colour range is mainly pastels. The main materials are cottons. You also find out that the printed catalogue is not going to be out for another month. This is unfortunately due to a delay at the printers. You are able to send a photocopied page that has been produced because of the delay. It summarises what will be in the new catalogue.

The person writing from Fry's Boutiques was their buying manager, Ms Nguyen.

1. You will need to find a lot of information to reply to the letter from Fry's Boutique. Identify what this information is and explain where you would get this information.

2. List the main points you need to cover in your letter of reply.



3. Prepare a draft of the letter.



Part B

Read the case study. Write down your responses to the tasks.

Case study

You are the office administrator at the Spunky Monkey Health and Fitness Centre, a job you share with Karen. Karen usually works the 6.00 am–3.30 pm shift and you work the 3.00 pm–10.30 pm shift. Both you and Karen work between 3.00–3.30 pm during which time Karen hands over any daily issues and fills you in on anything that has happened during the morning and early afternoon. You usually email Karen at the end of your shift informing her of any issues she should be aware of that have happened the previous evening.

The role of office administrator combines the roles of receptionist, office manager, customer-service officer and human resources manager, so both you and Karen are kept very busy sharing this job. Both of you are required to prepare letters and emails to clients, circulars and memos to staff, and letters and faxes to suppliers.

When you arrive at work, Karen informs you of a number of things that need to be followed up.

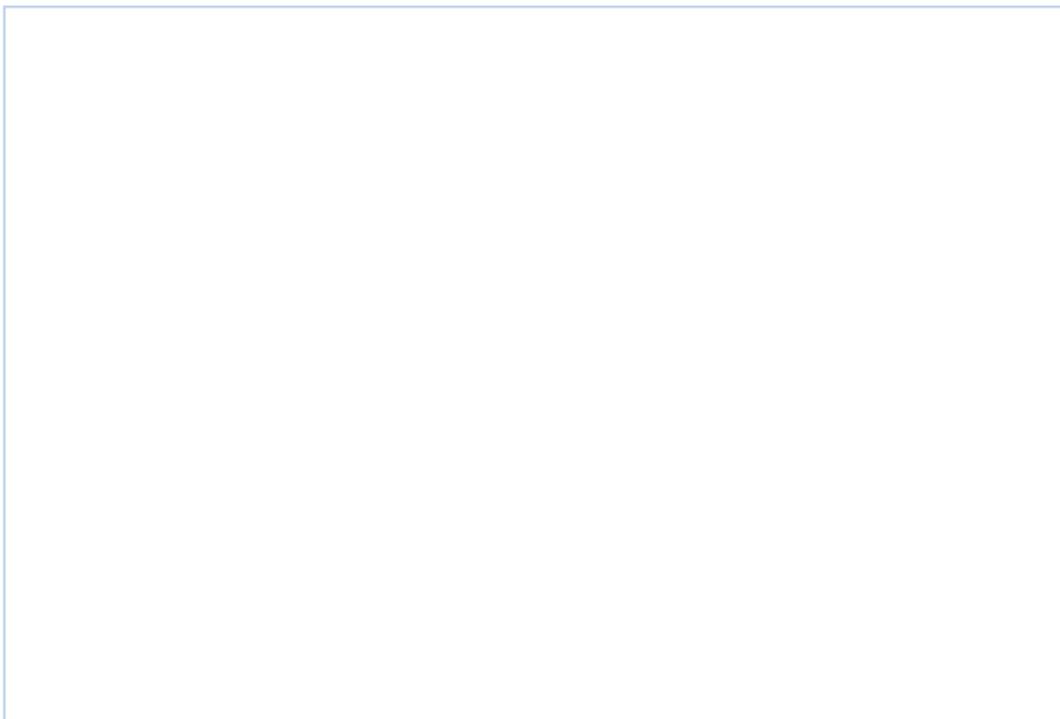
Karen has asked you to prepare a draft of the following documents and have these ready for her to proofread and edit tomorrow morning. You set to work straightaway.

Prepare and submit a draft of three of the following documents. Ensure you observe the communication protocols for the three documents and include the key points.

1. A memo for all Spunky Monkey Health and Fitness Centre coaches and personal training staff to inform them that the spring/summer fitness class roster is being prepared for release to clients in six weeks' time. Staff need to forward their availability, including preferred days and times, and preferred class options to you by the end of the day on Friday. They need to know that if you don't receive any information from them they will be left off the roster. Information should be forwarded to you on a form (and only this form) that they can get from either you or Karen.
2. A fax to the Fluffysoft Laundry, who launder all the towels used in the gym. Christie Baldacci is your Fluffysoft account manager. You have been having some problems for the past three weeks since Fluffysoft changed their truck roster system. The pick-up trucks are arriving late each morning so you are running out of clean towels and Christie asked you to let her know if you were unhappy with anything. You asked that the trucks deliver new stocks of towels each day by 6.30 am but unfortunately the trucks keep arriving after 9.00 am. Your rush time in the mornings is between 6.30 am and 8.00 am, so this is very unhelpful and is making your customers very angry. You want to know what Christie is going to do to solve the problem quickly, otherwise you are thinking of moving to another supplier.

3. A letter to all existing Spunky Monkey members informing them that for the month of September there will be a special offer. Anyone booking 10 or more personal training sessions in September will receive a voucher for a one-hour sports massage that can be used before 31 December.
4. A meeting agenda for the fitness manager who meets with the fitness coaches and personal training staff every second Thursday evening at 8.00 pm in Room 7B. The agenda always includes apologies and business arising from the previous meeting but should also include agenda items such as fitness training camp, newsletter articles, spring/summer roster, membership specials, injury register and staff social club events.
5. A memo to your boss requesting four weeks annual leave in May next year. By May, you will have 26 leave days owing to you and you want to travel to Thailand to visit some relatives and have a holiday.
6. An email to Bill in maintenance, informing him that some members were complaining about the levels of chlorine in the pool last night. After 8.30 pm last night, at least three members complained of sore eyes and two of them had a slight red rash on their arms and legs. They said their skin was burning. You would like Bill to follow this up and shut the pool down if necessary. He must also let Karen know what is going on first thing in the morning.
7. A letter to Lilly Vandenberg, one of Spunky Monkey's members. Lilly is going on holidays for six weeks in October and November and had asked if she could defer her membership during that time. The Spunky Monkey has a policy that gym memberships can only be deferred for a maximum of four weeks for a 12-month membership. Because Lilly has been a member for almost six years, Spunky Monkey is happy to be able give her a six-week deferral of her membership. She will need to hand her card into reception at her last gym session before her holiday and pick it up on her return. The dates on her membership will also be altered.
8. A paragraph or two to be included on the website explaining opening hours of various activities, including when reception is open. Spunky Monkey is updating its website and you have been asked to write up some information about the gym opening hours for a web page. Opening hours for the gym are 6.30 am–10.00 pm, the pool is open 6.30 am–9.00 pm and the café is open 6.30 am–8.30 pm. Training program times can vary from month to month and, in some instances, members must book into classes to secure a spot.

9. An email to Karen informing her that you have drafted all the documents she requested. You have left her a paper copy of each document in the green folder in her in-tray and electronic copies of each can be found in the draft correspondence folder in your electronic mail system. Don't forget to mention that you won't be in until 4.00 pm today and she agreed to cover for you until that time. Also mention that Peter Breckner, membership number M238904, has lost his membership card for the third time and that a couple of members complained about the high levels of chlorine in the pool last night – their eyes were hurting and two of them appeared to have a rash on their arms and legs. Karen needs to speak to Bill in maintenance about it straightaway to check if he has followed up on the email you sent last night. Also, the staff in the café packed up early and had left by 7.30 pm. The café is supposed to be open until 8.30 pm. Karen should follow this up with the café manager.
10. A table to show the roster for the spring/summer classes. Clearly show the day, time, class and instructor.
 - Troy is taking Pump it Up at 6.30 am on Monday, Tuesday and Thursday and at 10.30 am on Saturday.
 - Briony is taking Aerobic Lifestyle on Monday at 5.30 pm, Tuesday at 6.30 pm, Wednesday at 7.30 pm and Saturday at 9.30 am.
 - Craig is taking Battlefit on Monday at 1.00 pm, Tuesday at 7.30 pm and Wednesday at 6.30 pm.
 - Gavin is taking Pump it Up on Monday at 6.30 pm, Tuesday at 1.00 pm, Wednesday at 6.30 pm, Thursday at 5.30 pm and Sunday at 10.30 am.
 - Karla is taking Yoga Time on Tuesday and Wednesday at 5.30 pm, Thursday at 1.00 pm and 7.30 pm, Saturday at 4.00 pm and Sunday at 11.30 am.



A large, empty rectangular box with a thin blue border, occupying most of the page. It is intended for the student to write their response to the task.

Topic 3

Review document

Reviewing your document involves reading over your draft to check it for accuracy, appropriate tone, good presentation and correct use of plain English. Any written business document should follow the four C's, which means they should be clear, concise, correct and courteous. In other words, it should be written so it is easy for the reader to understand the information.

In this topic you will learn how to:

- 3A Check draft for suitability of tone for audience, purpose, format and communication style
- 3B Check draft for readability, grammar, spelling, and sentence and paragraph construction
- 3C Check draft for sequencing and structure
- 3D Check draft to ensure it meets organisational requirements
- 3E Ensure draft is proofread, where appropriate, by supervisor or colleague

3A

Check draft for suitability of tone for audience, purpose, format and communication style

You have now written a quick draft and done an initial check on your writing. You have checked whether your document contains all the required information and gathered more if necessary. Now it is time to do a proper edit of your work.

If you are doing a brief in-house memo or email, a full review of this kind may not be necessary. However, for longer business documents such as letters, reports and minutes you can expect to revise your work more than once, even before anyone else has looked at it. Very few people can write a perfect first draft. Checking your own writing is difficult, but you must always do a full review before passing the draft to someone else.

One way of attempting this review is to imagine you are the reader. If you have managed to take a break between writing the draft and doing a review, this will be easier to imagine.



The audience

Your tone is the feeling you express in writing. It is the attitude you convey to the reader through your words. The tone can affect the way a reader reacts to a document.

In any kind of correspondence, you don't want to use a tone that sounds impolite or blunt, bossy or assertive, tactless or negative. Choose your tone according to the audience. You could use a friendly tone when sending a staff email about some good news. You may need to use a very tactful tone when responding to a complaining customer in a letter.

You have to be very careful about tone in emails and letters because the recipient can't see your face or hear your voice. If you try to be humorous, they may not realise it is meant to be funny.



Have you used the right tone for your readers? Ask yourself whether the tone you have used will maintain good relations between your organisation and its clients or between you and your colleagues.

Here are examples of tactless and tactful tone.

Tactless tone

'Obviously, if you had read the instruction manual carefully you would not have had any trouble installing the equipment. Just look at page 32.'

Tactful tone

'I'm sorry to learn that you had trouble installing the equipment. I think the information on page 32 of the manual may help. If you have further trouble, please don't hesitate to call me.'

The purpose and format

Does the tone of your document match the purpose and format you are using? If it is conveying an instruction, is the tone polite? Will the readers understand the message because of your tone?

If the readers need to do something after reading your document, the action should be clear to them. A confident tone is suitable if your purpose is to convince someone of a course of action; for example, to:

- attend a meeting
- read a report and review it for management
- make business decisions based on financial spreadsheets
- sign a letter
- follow an instruction.

You would use an appreciative tone when thanking a colleague or client.



Active and passive language

If your message is to convey a negative comment or instruction, consider your tone carefully. If it is conveying a reprimand, it should be polite but firm, straightforward but tactful. If the message is negative, be sure to sound courteous.

If you write using active language, your writing will be more concise than if you use passive language.

Although it is always best to use active language, you may wish to write a negative message in passive language, as this can sound less blunt and less personal. For example:

‘Unfortunately, the material you recently sent to us was damaged. It has not been possible to use, so it has been returned to you by special delivery.’

In active language, the message, while being clear and easy to understand, sounds a little too direct. For example:

‘Unfortunately, you sent us damaged material. We have returned it because it is impossible to use.’

Practice task 9

Try writing a very brief note telling someone that their work needs to be more thorough. Use active language first and then rewrite it in passive language. Were you able to do this? Explain why using passive language might be better for negative messages.

3B

Check draft for readability, grammar, spelling, and sentence and paragraph construction

Read slowly through your draft to try to pick up any errors in grammar, spelling and sentence and paragraph construction. You should already have used the software spellchecker for an initial spelling and grammar check.

Imagine you are reading the document for the first time. How easy is it to understand the message? Is the purpose of the document clear to the reader?

Check that you have not used unnecessary words – that your writing is not overly wordy. You should aim for concise prose. Have you made a simple message or instruction sound complicated?

Check you have used words that will be understood by the readers. Delete any jargon or complex words the readers may not understand. Check you have used the best and shortest word. Don't use long words in an attempt to sound smarter. For example, write 'do' rather than 'suffice', and 'use' rather than 'utilise'.

Here is an example of a 'wordy' sentence and a more readable version.

'Wordy' sentence

Pursuant to the reference proposed by the undersigned at last night's meeting I herewith furnish the preparatory document.

This sentence is complex and full of jargon.

Readable sentence

Enclosed is a draft of the report that I discussed with you at last night's meeting.

This sentence is clear and readable.



Use white space

Use lots of white space. Even in emails, you should use a space between paragraphs to make reading easier. If you are not using an organisation's template, then work out a consistent pattern of spaces between headings and paragraphs.

Look at any very long sentences that contain a list of items. These may be better rewritten as a bulleted list. Such lists can make reading easier.

Readability is easier when you use:

- sentences that vary in length, but are mainly short
- simple words, where possible
- active language.

Grammar

Your software program may pick up grammatical errors, but don't just assume the changes suggested are what you want or that all the errors have been picked up.

Check through your work to find errors such as the ones listed below:

Checking for grammatical errors

1

Mixed up tenses – past, present, future mixed in a sentence

For example: Jake went to the office and gets the document. He thought it will be sent by courier.

2

Verbs that don't agree with their subjects

For example:

The Board think ...

This should be:

The Board thinks ...

That is because 'Board' is a collective noun. A collective noun is made up of a number of people or things. Other examples are team, group, herd and council.

3

Use of 'a' instead of 'an' and vice versa

For example:

He took a apple.

She went to an meeting.

This error sounds obvious, but the problem is that the software spellchecker does not know the difference because both 'a' and 'an' are spelt correctly – so you need to manually check your work for such errors.

4

Words that are misused

If you are not sure whether you have used the correct word, look it up in a dictionary. Examples are affect and effect.

Affect is always a verb.

Sally's bad attitude affects her work.

Effect can be a noun.

The effect of Sally's bad attitude on her work is astounding.

Effect can also be a verb. (This is a very formal use of effect.)

Sally's manager will try to effect a better working attitude.

5

Incorrect use or overuse of commas

A comma shows a pause or break in a sentence such as when you would take a breath if you were reading. For example, there is no need for the commas in the following sentence:

The supervisor told Mark, that he wanted to get the job done, before the close of business.

6

Incorrect use of commas around defining phrases and clauses

For example: We completed the project, and though it was unexpected, we beat the deadline.

The comma should be placed after 'and'. You can check this by deleting the words between the commas – does the sentence still make sense and is it a correct sentence?

7

Missing punctuation at the end of sentences and questions

Where should the missing punctuation be in the following statement?

Checking your own draft for mistakes is not easy Why is it easier for someone else to check your draft

8

Verbs becoming nouns

For example:

We undertook the development of the material.

This should be: We developed the material.

Spelling

As well as using your software spellchecker, read through your document to check your spelling. The spellchecker will not pick up a word that is correctly spelt but not the one you want. For example, you may have typed 'to' instead of 'too', or you may have typed 'a' instead of 'an' or 'collect' instead of 'correct'. Also, the spellchecker may suggest a replacement that is not the word or meaning you intended. Think carefully before you accept the spellchecker's alternative word.

Again, if you are unsure of spelling, check a dictionary.

You must check the spelling of all names in your documents. People can get very upset if their names are spelt incorrectly. And incorrectly spelt addresses may not reach their destination.

Sentences

There are four kinds of sentences. Look at the examples for each kind of sentence below. For readability and conciseness, try to use mainly simple and complex sentences; these sentences have one main idea. Compound sentences can become confusing and harder to read. Vary your sentence length but aim for short sentences.

Simple	Simple sentences have one main idea: The book was sent via Express Post.
Compound	Compound sentences have two main ideas. These are joined by a comma or semicolon and a conjunction such as 'and' or 'but'. Here is an example: The book was sent via Express Post, (First idea) but the parcel was sent by courier. (Second idea)
Complex	Complex sentences have one main idea and a second part that explains the idea: The book was sent via Express Post (The idea) because it was urgent. (The explanation)
Compound-complex	Compound-complex sentences have at least two main ideas and at least a second part explaining one of the ideas: The book was sent via Express Post, (The first idea) but the parcel was sent by courier (The second idea) because it was so heavy. (Explanation)

Paragraphs

Paragraphs should begin with a topic sentence that alerts the reader to what the paragraph is about. The rest of the paragraph expands or explains that idea. Keep paragraphs short. Five or six sentences are enough.

Paragraphs must be linked so they move logically from one paragraph to the next. Your reader should be able to see the way in which the idea in one paragraph links to the idea in the next. Paragraphs should not be too long. Like sentences, they should contain the expansion of only one main idea.

Write onscreen material

You might be asked to write material that will appear on the internet, the intranet or on the web. Writing onscreen material is different to writing for print. Unlike print, the font should be a sans serif font. This has been found to be easier to read on screen. The size should be no smaller than 12 point.

People reading from a screen tend to scan the material. This means they look for key words rather than reading every word. For this reason, remember these guidelines when writing for on screen.

Guidelines for writing for on screen

- The language must be concise – each word must count.
- The important words must be at the start of the sentences.
- The most important information must be at the top of the page.
- Use bold or italic to emphasise main points in sentences.
- Use bulleted lists for a number of important points.
- Information should be chunked into small amounts – smaller than print-size paragraphs. Some writers suggest that three sentences are enough in a screen paragraph.
- The information should be planned for a page so the reader does not have to scroll too much. If your document is long, and dividing it into separate, short pages is not possible, then you should add hyperlinks so readers can move easily around the document.
- Use navigation buttons, such as Back or To, for readers who are unfamiliar with screen reading.

Practice task 10

Find the errors in the memo (hint: there are at least 10). Although you may find this easy, these mistakes are very easy to make – especially if you are in a hurry. Put a red circle around the mistakes.

Memorandum

To: All staff

Cc: Ms Smith

From: Office Manger

Date: 24 July 2016

Subject: Car park

The car park surfacing is finished, but because the door is broken, we still cannot use the car park. This may effect the time you get to work.

Does this upset any meeting plans. If you thought this is the case please let you're manager know

We realise this is an nuisance and do apologise.

We hope the accessing of the park will be available by Friday

3C

Check draft for sequencing and structure

At this point, you need to read over your document to make sure that it is organised in a clear and logical order. The reader should know what the document is about from the beginning. They should be able to follow a logical sequence of the argument, the investigation or the instructions through to the end. They should then be able to see how you have reached the conclusion. By the end, the reader should understand what you want them to know or to do, and why.

Most documents, even short ones, should include:

- an introduction describing what the document or message is about
- the main text, which has the sentences and paragraphs describing the details of the information
- a conclusion summarising the key points and indicating any outcomes, recommendations and actions to be taken.



Structure your document

If you are writing a long document, choose your headings carefully. They should briefly convey what the text that follows is about. Choose a plain style for your headings and use different size fonts for different levels of heading. Three levels of headings are usually enough, though four is acceptable in a detailed document.

Make sure the structure of your document is consistent. Use one size of font in the body of the text. Use the same line spacing, the same spaces between paragraphs and the same spaces above and beneath headings. Use the same type of bullets throughout.

If you are quoting from other sources, choose a different font for the quotations. Normal practice is also to indent these. Make sure you acknowledge the sources in detail, giving author, date of publication, title, edition, publisher and place of publication.

Use bold or italic to add emphasis. Underlining is no longer standard practice in documents or published materials.

Practice task 11

Improve the sequencing and structure of this document by rewriting it.

The next team meeting is scheduled 16th May 2015.

Today's team meeting primarily addressed workplace health and safety. Sally Knowles submitted a formal complaint about the clarity of hand-washing procedures. Nadiq Pascale raised a concern about the leaking tap in the staff bathroom.

The manager, Christof Zule, responded to Nadiq by asking the team for feedback and suggestions. The team suggested that a plumber be contracted to review all piping and taps in the office, and repair leaks. Christof suggested that Sally should raise her WHS concern with the WHS representative and HSC.

Christof suggested that Nadiq should help him prepare a procedure staff can follow to ensure the taps are turned off after usage.

The focus of the meeting was WHS concerns.

3D

Check draft to ensure it meets organisational requirements

Check your document meets all the organisational requirements and communication protocols you identified before you wrote your draft. You may have written a very good document, but if you haven't followed the organisation's style then your manager will probably not accept it. Or they may have you reformat the entire document so it complies.

Use the checklist below to make sure you have included all requirements and followed any procedures.

Document:

Task	Completed	
	Yes	No
Used the required template		
Followed the style guide fonts, heading styles, footers and headers, etc.		
Used an appropriate software program		
Used the recommended language style, non-discriminatory language and a suitable tone		
Made the required number of copies		
Made a back-up of the document		
Gained copyright permission where relevant		
Asked an authorised person to sign the document (when appropriate)		

Suggestions

Practice task 12

Obtain a document from your workplace, such as a meeting report, a WHS notification, a procedure or a memo. Use the checklist to determine that all the organisational requirements are met. Now suggest how improvements could be made.



3E

Ensure draft is proofread, where appropriate, by supervisor or colleague

Most major documents must be checked by a senior person in the organisation. However, even for smaller items you will find it worthwhile to ask a colleague or team leader to check your work. Editing your own work is very difficult because you read what you expect to be there, rather than what is actually written.

After you have checked your document and made your corrections, you are ready to pass your document to your supervisor, manager or another person for proofreading. Mark your copy as 'Draft' so that anyone can see that it is not a final version. You may have to make changes and then submit the draft again.

If you work for a large organisation, you may have some of your larger documents, such as reports, proofread by trained editors. They will use proper editing marks and you will need to find out about these from your organisation's manuals or house style.



Practice task 13

Read this memo. Work out how Gary's manager wanted the memo changed. Also find the two things that Gary should have found out before giving his manager the memo.

Memorandum

To: all staff *cap*
 From: Mary Hill
 Date: March 21, 2016 *Bold c*
 Subject: Emergency evacuation practise

There will be an emergency evacuation practice on Monday ~~April 3~~ at 11:00 am. Follow the instructions of your department's fire wardens.

The fire wardens are:

- Marketing John Small *is it still John?*
- Sales Peter Pereira
- Finance ~~Trang Du~~ *Duong*
- Stores Kerry Black

The evacuation ~~will~~ *should* finish by 11:30~~am~~.

Thank you for your co~~o~~peration.

Summary

1. When you review your document you must check that you have used a suitable tone for your audience.
2. Check that any document has a clear introduction, middle and conclusion, even in short documents such as emails.
3. Check that you have used the essential elements of language correctly. This includes using:
 - active language
 - correct grammatical structures and punctuation
 - accurate spelling
 - concise sentences and paragraphs.
4. When you are writing for on screen, make sure you:
 - use fewer words than you would for print, because most people scan on-screen documents
 - put important information at the top of the page and at the beginning of paragraphs
 - use bulleted lists for easy reading of points.
5. Make sure all your documents comply with organisational requirements such as style guides and templates.
6. Get someone to proofread your documents, because it is difficult to proofread your own writing.

Learning checkpoint 3

Review document

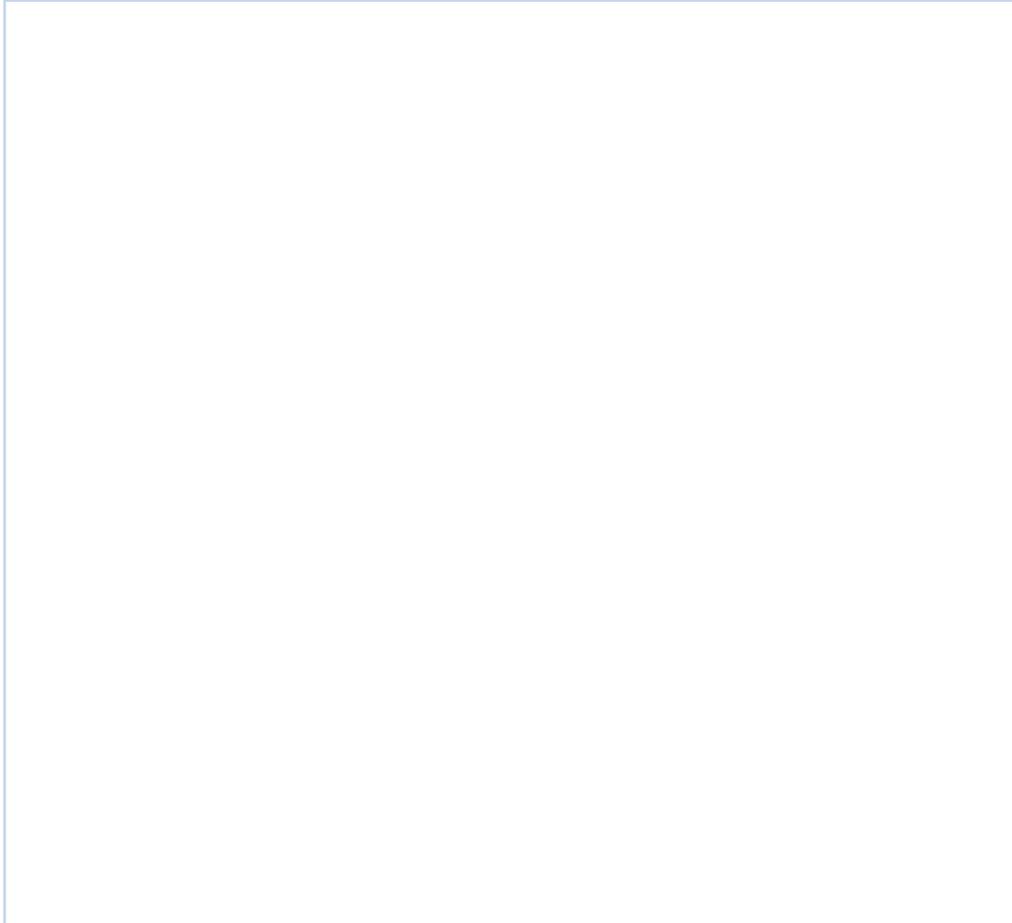
This learning checkpoint is designed to confirm your skills and knowledge in reviewing documents.

Part A

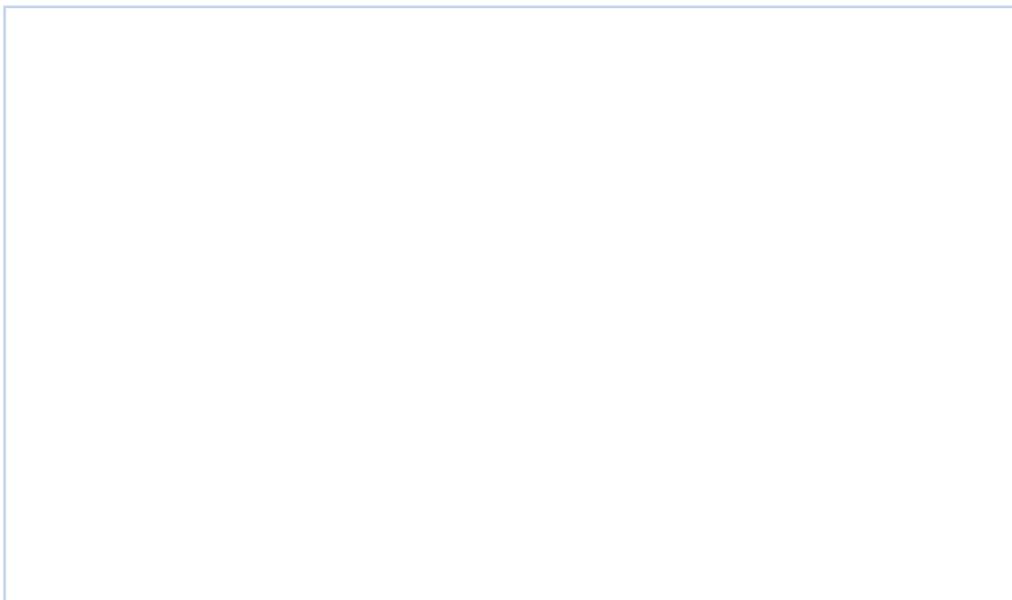
1. Review a letter you have previously drafted. You may choose to review the letter to Marcia Clothing you drafted for Part A of Learning checkpoint 2. Check each of the following items:

- Have you used a suitable tone for the letter?
- Have you used plain English and explained all the details clearly?
- Is all the grammar, punctuation and spelling correct?
- Did you double-check the spelling of all the names and addresses?
- Does the letter have a clear introduction and conclusion?
- Is the information in a sensible order?
- Are the spacing and fonts in the letter correct, according to usual letter formatting?
- Did you remember the enclosure (if required)?

2. Make a copy of your draft letter and ask a supervisor to proofread your drafted letter thoroughly. Ask them to explain why they made any changes or corrections. Discuss items that you are not sure about or disagree with. Submit a copy of the proofread letter with the supervisor's suggested changes. Keep a copy of this proofread letter as you will use it again in Learning checkpoint 4.



3. Submit a summary of the discussion you had with a supervisor for question 2.

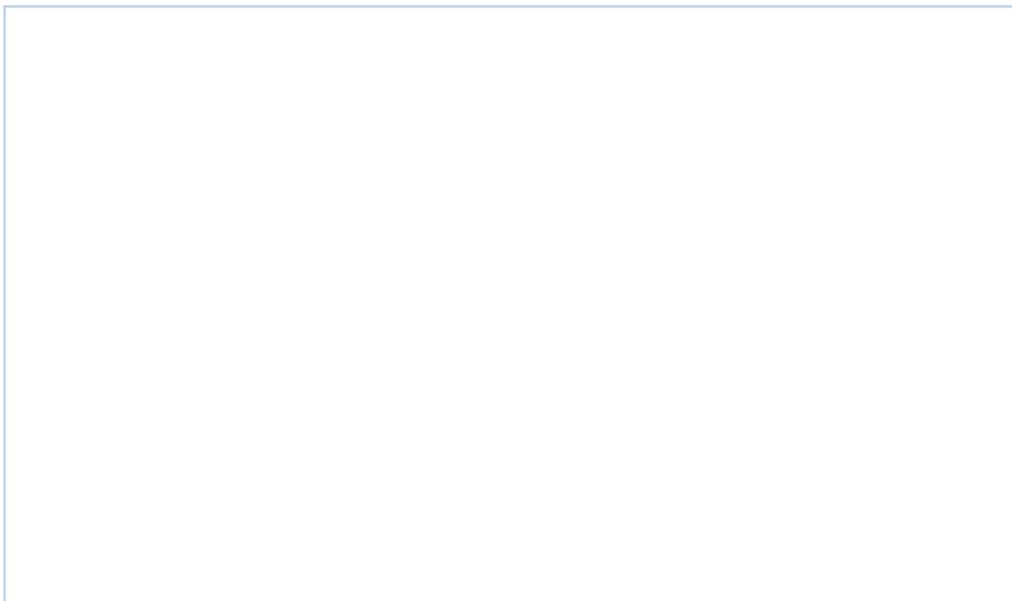


Part B

1. Research an organisation, or interview your supervisor, to find out what the organisation's requirements are for business documents. Write a short report that explains the requirements, and include:
 - the use of templates
 - the use of particular fonts and structures
 - the proofreading and final checking processes.



2. Would the letter you produced in Part A have met the organisational requirements? Explain why or why not.



Topic 4

Write final document

You may have to submit your draft to other people many times before you reach the final version of the document. At each point, you need to check what changes are required, make the changes and then read the document over again. The document will then be ready to forward to the designated recipient. Finally, you will need to file the document according to your organisation's procedures.

In this topic you will learn how to:

- 4A Make and proofread necessary changes
- 4B Ensure document is sent to intended recipient
- 4C File copy of document in accordance with organisational policies and procedures

4A

Make and proofread necessary changes

The person proofreading the draft will often find missed details from the first edit. So they will make still more changes to your original work. They may also want you to add more information, delete unnecessary pieces or make corrections.

There could be corrections to grammar, spelling, punctuation or ways of expression. Your manager or supervisor may have preferences for the way they like to express ideas or opinions and want you to change the tone of your writing.

You may have to rewrite sections to make them clearer. You may have to change the order of some of your paragraphs to make the document flow more logically.

The person proofreading your work will let you know when they think it is ready for a final printing. You may have to get them to approve the final copy. If you are producing a letter, you need to get the relevant person's signature on the final copy.

When you have written minutes, your proofreader may feel that:

- you have not reflected the mood of the meeting accurately
- you have missed a very important point made during a discussion
- you have misunderstood because you were not able to follow a detailed or technical discussion
- you were not able to check spelling.

Example: the importance of proofreading

Jasreen had taken minutes for a meeting in her office about computer applications. In the minutes, she wrote:

'Mr Robbins noted that MS Photo Editing would be installed. It would be good for capturing graphics and imaginings. Ms Johnston from the IT section will show anyone how to make use of the program.'

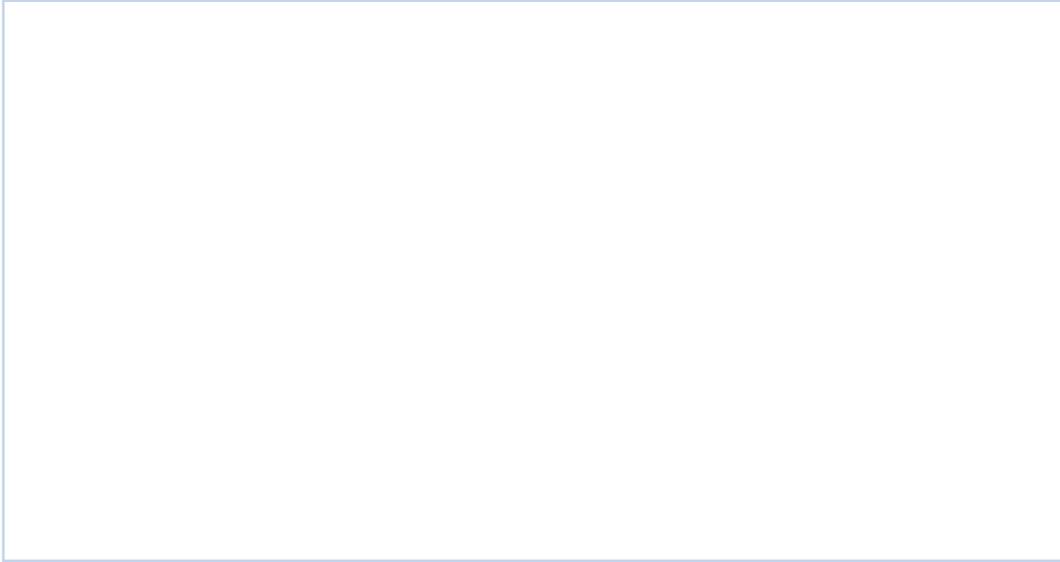
Jasreen's manager had to change four things in the minutes:

- 'MS Photo Editing' should have been 'MS Photo Editor'
- 'imaginings' should have been 'images'
- 'Johnston' should have been 'Johnstone'
- Jasreen had missed out 12 July – the date for the installation



Practice task 14

From the previous example about Jasreen, suggest reasons for Jasreen's mistakes in the minutes. Can you see why having the minutes checked is important?



4B Ensure document is sent to intended recipient

After completing all your research and information gathering, writing and editing, it is time to present your document to the relevant recipients or your document's audience. The recipient may be your team leader or manager. They may need to sign the document or add information to it. It could be an external client. There may be many recipients for a memo, an email or an intranet item.

Mistakes are especially easy to make when you are sending a document to several people. Check the list of intended recipients and also check with a supervisor that the list is accurate. Check who you must give copies of letters to. This can be very important if any follow-up action is required.

If your audience has understood the message and responded to it appropriately (where applicable), you will know you have produced a good document.



Practice task 15

Read the case study and complete the following tasks.

Case study

Eva has been asked by her manager to prepare a memo to advise staff about an emergency evacuation drill that is happening this Friday. The manager said the drill will happen between 9.00 am and 4.00 pm, but the exact time will not be shared so a real emergency scenario can be simulated.

Eva needs to send the memo to all twenty staff members by the close of business today.

1. In a paragraph, explain how Eva can check the list of recipients to send the memo to.

2. In your own words, explain why it is important that Eva confirms who the recipients are before sending out the memo.

4C File copy of document in accordance with organisational policies and procedures

Most organisations require that you make copies of documents and file them. You might have to file a document in a hard-copy filing drawer, on a CD-ROM, a memory stick, on the hard drive of your computer or on a cloud server.

When you are filing a document, make sure you file the final version.

Organisations file their hard-copy documents in different ways:

- Minutes of meetings, letters, memos and copies of emails are usually filed in date order, with the most recent documents on the top or at the front.
- Customer or supplier records may be filed alphabetically.
- Letters to and from clients may also be filed under the client's name.
- Reports may be filed under key words that indicate the subject matter.
- Reports may be filed under categories, such as annual reports or marketing reports.

Filing systems

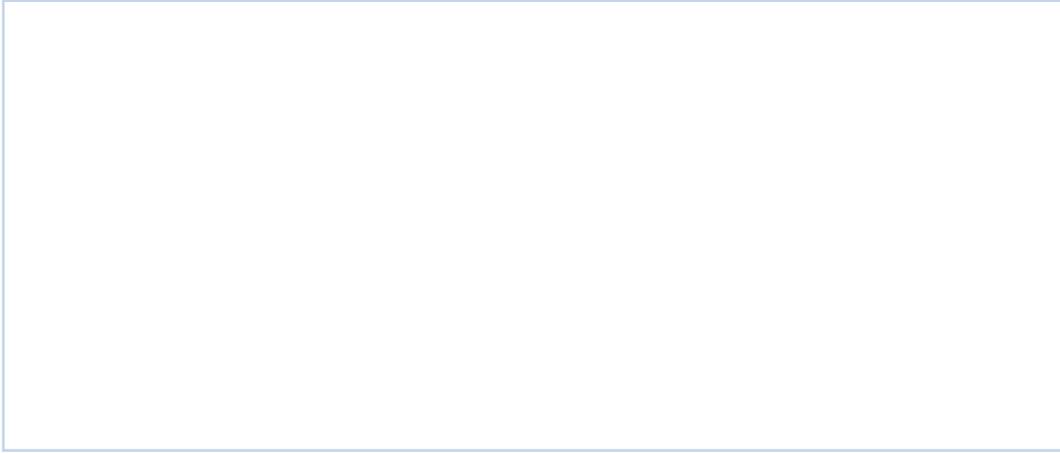
Most organisations have both hard-copy and electronic filing systems. Sometimes both may be used for the same document. For example, if a client wrote a letter of complaint, this would be filed in the paper filing system. The answer from the organisation may have been produced electronically and filed in a computer folder, but a printed hard-copy may also be filed with the client's original letter.

You may have to add a file path in the footer of any computer-generated documents. Documents are saved as files and stored in folders. If you don't file your work accurately both you and others will have difficulty locating it. You must find out what name to give your document and where to file it – the drive, the folder (directory) and the file.



Practice task 16

Why is it important to file copies of business documents, even ones that may not seem very important?



Summary

1. After making the changes required by the proofreader, you must read the document over again carefully.
2. Always check the recipient's name and address and check that you are sending the document to the right person or people.
3. All documents should be filed according to the organisation's procedures and requirements.
4. Documents might be filed electronically, as hard copies, or both.

Learning checkpoint 4

Write final document

This learning checkpoint is designed to confirm your skills and knowledge in writing final documents.

Part A

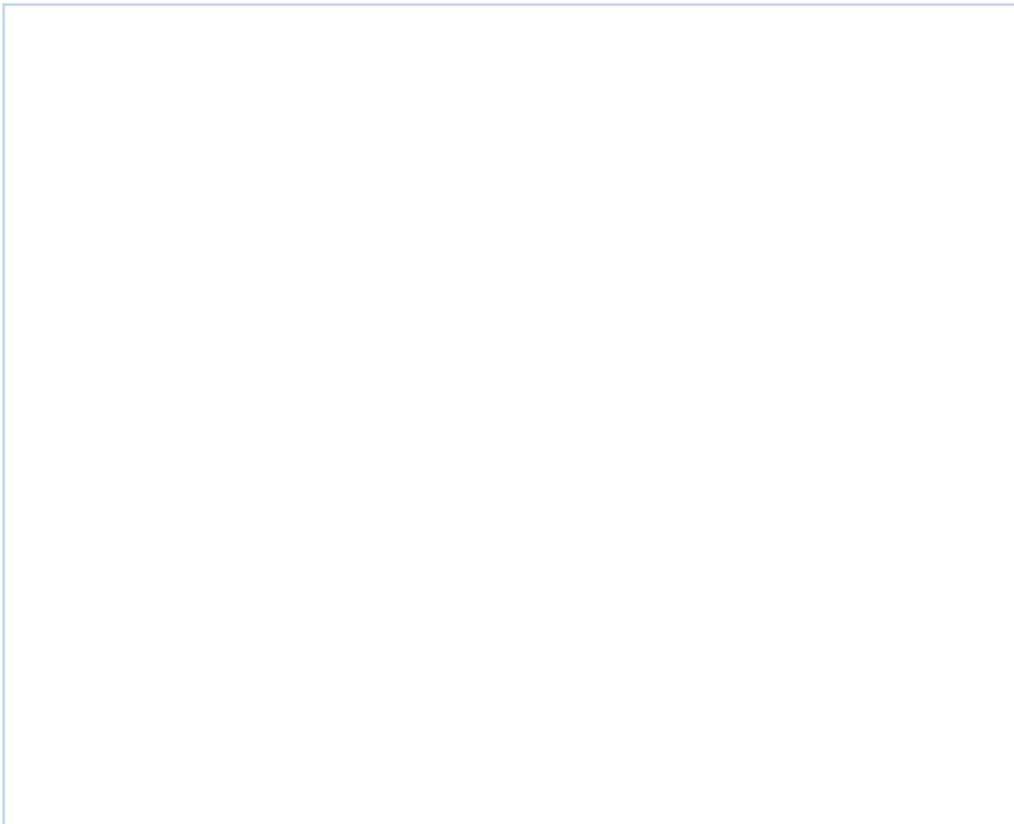
1. Using the proofread copy of the letter you drafted in Learning checkpoint 3, make the necessary changes to your letter and submit the final copy.



2. Describe how you would send the letter and exactly how you would address the document so that it is sent to the intended recipient.



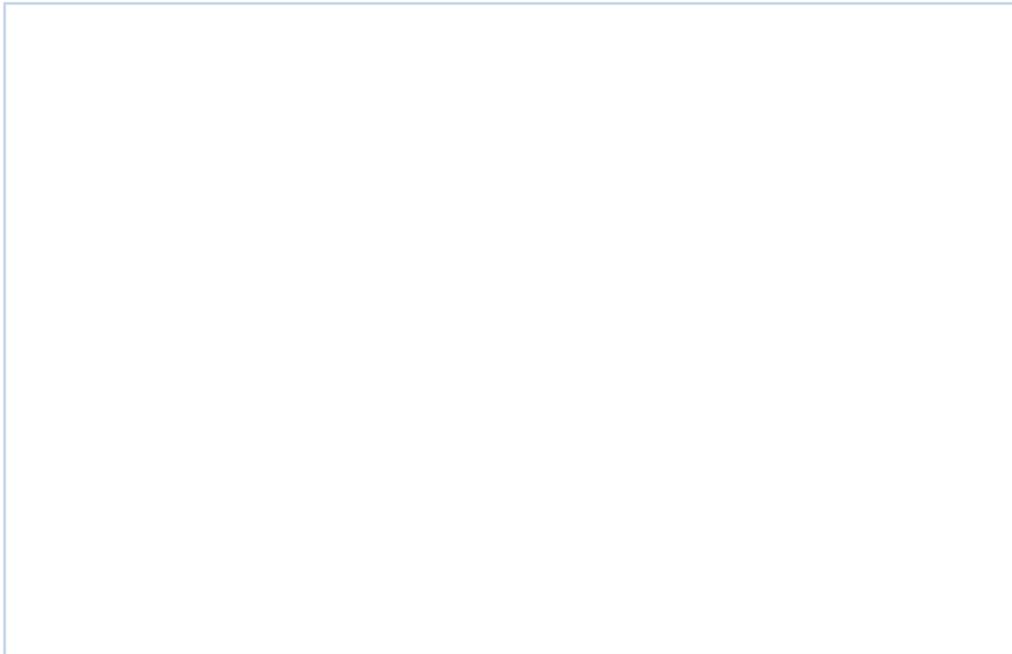
3. What is the most likely way you would file the letter in a workplace?



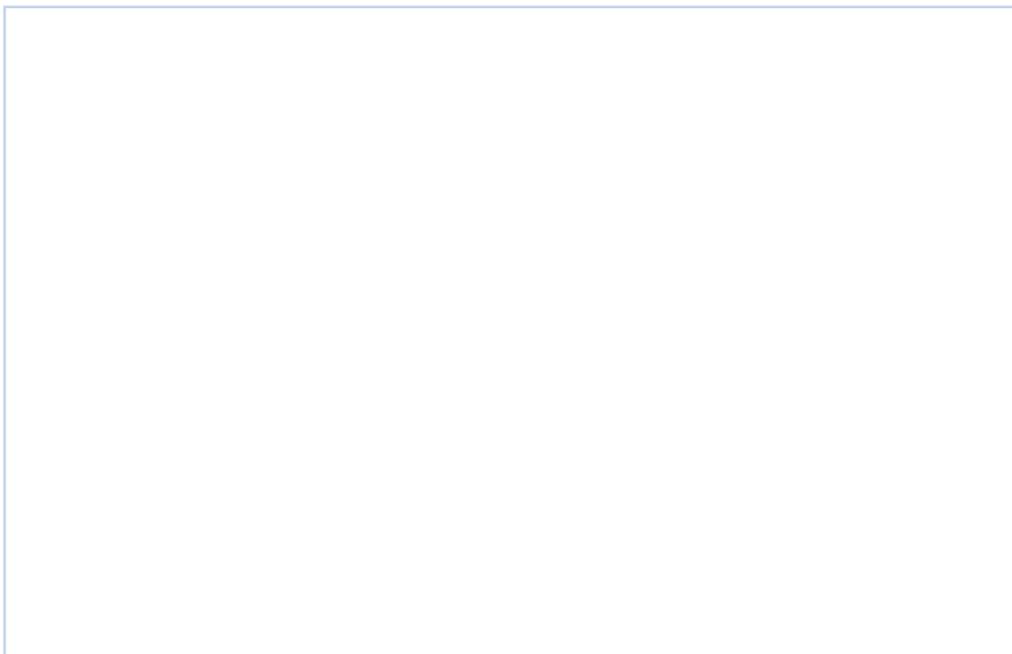
Part B

1. Draft an email to all clients on the Spunky Monkey Health and Fitness Centre database. Inform them that there will be a new monthly newsletter coming out on the 1st of each month, starting next month. The newsletter will include tips on fitness and nutrition, an article on a high-profile athlete and how they approach their training regime, special offers only available for newsletter readers, information on new fitness trends and updates on the Spunky Monkey Health and Fitness Centre.

Ask someone to proofread your email and to mark any recommended changes. Submit a copy of the proofread email showing the recommended changes.



2. Produce the final email on your computer. Submit a copy of the final email.



Part C

Interview your supervisor about the organisation's policies and processes regarding filing documents. List any policies and procedures that must be followed.



