

BSB 7.0

**BSBWRT311**

**WRITE  
SIMPLE  
DOCUMENTS**

# **BSBWRT311**

## **Write simple documents**

Release 1

## **Learner Guide**

Aspire Version 1.2



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## Before you begin

This Learner Guide is based on the unit of competency *BSBWRT311 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](http://www.training.gov.au).

## 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	These highlight key 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.
Summaries	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 provides definitions for each foundation skill.

Foundation skill area	Foundation skill description
Reading	<ul style="list-style-type: none"> <li>Interprets a variety of text to determine and confirm task requirements</li> <li>Proofreads document checking for grammar, spelling, structure, and suitability of style and format for audience</li> </ul>
Oral Communication	<ul style="list-style-type: none"> <li>Uses listening and questioning skills to seek additional information or confirmation of task completion</li> </ul>
Self-management	<ul style="list-style-type: none"> <li>Follows accepted communication practices and protocols when seeking information or feedback from others</li> <li>Takes responsibility for planning, sequencing and prioritising tasks to achieve required outcomes</li> </ul>
Technology	<ul style="list-style-type: none"> <li>Uses the main features and functions of digital tools to complete work tasks</li> </ul>

## 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 simple documents	1A Determine the audience, purpose and requirements	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	1B Determine document format, structure and style	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	1C Establish methods of communication and key points	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
Topic 2: Draft simple documents	2A Draft a document to communicate key points	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	2B Check the draft meets document requirements	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	2C Obtain additional information required	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
Topic 3: Finalise simple documents	3A Proofreading a document	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident
	3B Making changes to a document	<input type="checkbox"/> Confident <input type="checkbox"/> Basic understanding <input type="checkbox"/> Not confident



## Topic 1 | Plan simple documents

- 1A Determine the audience, purpose and requirements
- 1B Determine document format, structure and style
- 1C Establish methods of communication and key points

# 1A Determine the audience, purpose and requirements

Organisations require a variety of written documents, including emails, letters and memoranda. It is essential to tailor the documents to the audience and purpose of the activity.

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 must be clear about the purpose of the document and whom it is for. You must decide on the style of document and have good written communication skills, as well as good formatting skills.

## Determining your audience

For your documents to make an impact, you need to identify who your intended audience is. Your audience could consist of people internal or external to your organisation.

When preparing a business document, it is important to have a clear idea of whom 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.

There are three types of audiences:

### Lay audience

A lay audience usually has no special or expert knowledge. It needs background information and expects more definition and description. A lay audience reacts better to graphics and visuals.

### Managerial audience

A managerial audience may have more knowledge than the lay audience about the subject. A managerial audience needs information so it can make an informed decision about issues.

### Experts

The experts are often theorists. Document formats are often elaborate and technical and specialised vocabulary may be used.

## Understanding the document's purpose

Each organisation will have its own policies and procedures in relation to documents and writing.

Business documents are used for many purposes. There are various situations when a simple business document needs to be prepared, with examples of what the document may be about. Such documents may be for external customers (e.g. clients or suppliers) or internal customers (e.g. staff within an organisation). The purpose of many of the documents is to communicate information. Other documents may be prepared to store data or keep a permanent record of information.

It is important to understand the purpose of the document prior to starting work on it so you are not wasting your time and you can action it correctly the first time.

## Requirements and processes

Each document will need to be contextualised to meet the audience needs and have a clear purpose included. You also need to ensure that you are following your organisational requirements.

Effective communication is the key to any professional document created. You should ensure that you have clearly outlined the key information and it is written in plain English. You should also consider whether the document is for a large or small group of people. Are the people in the group similar (e.g. a work team) or are they different (e.g. a range of customers)? When you have a clear picture of your audience (whom the document is for) and the purpose of the document, you will also understand what the audience needs to know, what language and style to use and how to present the document.

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

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 consider 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. Organisation policies and procedures for creating written documents can fall under the umbrella term of 'style guide'.

Other policies and procedures for written documents can be privacy policies, communications and media policies and social media policies. These policies ensure that organisations are represented in a consistent way and that there are no issues of privacy being breached, for either employees or company data.

House style or style guides can include:

- letterhead
- business cards
- memoranda
- reports
- signage
- PowerPoint presentations
- advertising
- Logos
- templates to use for specific documents (e.g. a set style for footers, headers, fonts, margins etc.) so all documents look the same
- software programs to use
- preferred fonts
- heading styles
- the type of language to use: formal or informal, active or passive, inclusive (e.g. non-gender specific)
- specific styles to follow (e.g., abbreviation styles, whether to use 'eg' or 'e.g.', when to use capital letters, margins and line spaces).

## Example

### Style guide details

A style guide defines the standards for documents. It is a reference source and training tool for those who write various forms of documentation.

Below is an example of inclusions in a style guide.

<b>Brand history overview</b>	Includes the company history, vision and key values
<b>Mission statement</b>	The company's mission statement including 'tone of voice' in documents: <ul style="list-style-type: none"> <li>▪ Customer-oriented mission statement</li> <li>▪ Product-oriented mission statement</li> </ul>
<b>Logo usage</b>	When and where you can use your company logo, including its size and position in a document
<b>Colour palette</b>	Showing your primary and secondary colour palettes, including colour breakdowns for print, screen and web design
<b>Type style</b>	The specific font to be used and what the default font is for web use
<b>Image style and photography</b>	Examples of image style and photographs used within the brand
<b>Business card and letterhead design</b>	Examples of how the logo and font are to be used for standard company documents

## Practice Task 1

### Question 1

---

Draw a line to match each term regarding the different types of audiences and their definition.

- |                       |  |
|-----------------------|--|
| » Managerial audience | » They usually have no special or expert knowledge. They need background information and they expect more definition and description. They react better to graphics and visuals. |
| » Experts             | » They may have more knowledge than the lay audience about the subject. They need information so they can make an informed decision about issues.                                |
| » Lay audience        | » They are often theorists. Document formats are often elaborate and technical. They may use specialised vocabulary.   |

### Question 2

---

What are three things that are determined by style guides or written communication policy?

### Question 3

---

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?



# 1B Determine document format, structure and style

After you have established the document's audience, reason or purpose, you will 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 in relation to structure and style: documents that communicate information and documents that store information. When you are asked to produce a document, you should be clear about what the document is for. This helps you decide how much you need to write and what format the document should take. The purpose of the document determines the format, structure and style it will take.

Documents that communicate information include:

- business letters
- memoranda and emails
- briefing papers
- meeting documents
- tables (e.g. schedules, financial spreadsheets)
- forms (e.g. 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? If you are preparing a meeting agenda, does it need to follow a preset organisational style?

Some organisations require you to use a standard template for formatting letters, emails and memoranda. There are also standard templates for business documents in most word processing programs. The set of rules defining the format of the communication is referred to as a 'protocol'. It needs to be easily readable and have correct:

- spelling
- grammar
- punctuation
- sentence structure.

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.

## Organisational policies and procedures

Most organisations have policies and procedures in place to control and direct how communication occurs within and outside the organisation. These can include:

- protocols and processes that outline how communication occurs with external customers
- the use of email
- the use of instant messaging apps
- the nature of the content communicated
- templates and formats for formal documentation.

## Business letters

**It is important to understand the structure that business letters follow in order to produce professional documents.**

Letters are used to pass on a wide range of business information. Letters 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.

A set of communication protocols is used 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-hand side of the page, single spacing between lines and a double space between paragraphs. Sometimes the punctuation is open. This 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.

Letters are always written on letterhead, whether in hard copy or in an electronic format, such as a pdf, that can be attached and sent via email.

An example of a business letter format is shown below.

<div data-bbox="1082 427 1337 629" style="border: 1px solid black; padding: 10px; text-align: center;"><b>REPLACE WITH LOGO</b></div>
<p>Date: 01/09/20</p> <p><b>"Street Address goes here"</b></p> <p>Dear [Insert name here],</p> <p>Write the body of your letter here. To update any of the information in the letter, simply click and start typing!</p> <p>Want to customise your colour palette? Just go to the Design Ribbon and select colours from the list. If you choose a colour palette that you like, the colours of the header images will update. Make the document yours!</p> <p>Want to change the fonts that are used? That is just as easy to update. Just go to the Design ribbon and choose Fonts from the menu options. You can use a built-in font combination or choose one of your own.</p> <p>Double click in the header to change out the logo placeholder. Double click in the footer to update the contact information.</p> <p>Warm regards,</p> <p><b>Name here</b> Your Title</p> <p style="text-align: right;"> [Email]  [Phone]  [Website]</p>

## Business memorandum

A business memorandum (memo) is a popular format for sending information within an office environment.

Memoranda are usually sent when information needs to be forwarded to several people or if a record of correspondence is required for future reference. Memoranda can be communicated and distributed in many ways:

- face to face
- email
- through communication and collaboration platforms (e.g. Microsoft Teams or Skype).

The subjects of memoranda may 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 timelines and new projects
- short announcements to staff about decisions made by team leaders or managers.

## Business emails

Emails are sent when you want to relay a message quickly and you want to have written evidence of the conversation.

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.

Key parts of an email include:

To

On this line, you type the email address of the recipient; you must be incredibly careful about this address because even a small mistake will mean the message will not be received. Sending an email 'To' a person means there is something for them to action.

## CC

'CC' is short for sending a 'carbon copy' to a person. On this line, you type the email address of anyone who needs to receive a copy of your email, such as your manager. Use this line when someone needs to know something, but is not required to action anything.

## BCC

'BCC' means to send a 'blind carbon copy' to a person. 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 recipients' copies of the email. The people who are sent the message, or are CC'd into the message, will not see anyone who is BCC'd in the message. It is a private communication. There is nothing for people who are BCC'd to action, the email is being sent to them for their information only.

## Subject heading

On this line, you should give an indication of what the email is about; this should be brief and to the point.

## Body of the email

This is where you include the information to the intended recipients in a clear, concise format. If there is an action or response required, ensure that is clear to your recipient.

## Signature

Business emails always use the company-supplied signature for signing off. These signatures generally contain the company logo, the name of the person, their business title and their contact details.

The structure 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. There should be a space between the greeting and the body of the message, as well as between paragraphs, for easy reading. The close and signature should be as for a letter, although you may set up an automatic signature on your computer. Most organisations have a specific style that all employees must use for their 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 that of a letter. A sans serif font should always be used for any text that is read on screen. Arial or Calibri is a good choice for an email.

### Sample Professional Email

Recipient's Name

Address

Dear Madam/ Dear Sir/

#### Placement

I am a student of Administration, now in my second year (fourth semester), at the University of Melbourne. As part of the course of studies all students are required to do a 8-month and 6-week work placement.

As I hope to work in a ..... after finishing my studies, I would be particularly interested in working in the export/auditing/department of your firm to gain some experience. I would also be interested in ..... I am completely flexible and would be happy to work in any department in order to gain experience.

I would be very grateful if you could let me know whether there would be a place for me. The most suitable times would be from early March to mid-October.

Please find enclosed my CV/details of my courses/details of my previous work experience/details of previous work placements. As you can see from my particulars, I have a good command of English and a working knowledge of Spanish.

Thank you for your attention. I look forward to hearing from you.

Yours Faithfully.

.....

## Written procedures

Every organisation will have its own format for creating written procedures, but all have some things in common.

Much of the effort in creating written procedures takes place before you begin to write. The key to strong procedures is understanding how the people who use the documents perform the documented activities.

Written procedures are documents that outline how to perform certain activities. They are generally step-by-step instructions of how to complete or perform tasks. They can relate to occupational health and safety (e.g. how to exit the building safely in case of an emergency) and can also contain imagery and graphics to help illustrate points.

When writing your procedure document:

- ask someone not directly involved to draft a document to add their perspective and avoid jargon
- use precise language and explain things fully to avoid misunderstandings that may occur
- if creating a policy, decide on the consequences or disciplinary actions for breaking the policy
- send a draft for review to a stakeholder
- if possible, allow compliance to review your document
- obtain final approval from senior management before distributing the document.

When writing a procedure, often many people will be involved in determining the correct information. When discussing how to create a written procedure, it is important to take a summary of notes. This is to refer to at a later date and it can help remind you of the exact details of the meeting and what information you need to include in your written procedure.

Written procedures will need to be signed off by management before they can be distributed.

The characteristics common to all good procedures are summarised below:

<b>Ensure compliance</b>	Policies and procedures provide one means of proof that you have considered and implemented controls on activities
<b>Increase accountability, training and responsibility</b>	Having written procedures can provide a structure for continual improvement
<b>Streamline internal processes</b>	The best processes should be captured, and these provide the most efficient path for day-to-day activities
<b>Avoid errors and manoeuvre through incidents and problems</b>	Policies and procedures proactively anticipate problems and provide a structure for avoiding troubles or dealing with an immediate problem Check spelling and grammar, and ensure the structure of the document is solid

## Meeting agendas

An agenda is a guideline for the format of a meeting that a chairperson needs to follow during the meeting so that it runs smoothly and on time.

You need to think about creating an agenda that outlines the topics of discussion for your meeting. An agenda is usually created by an administrator, such as an administration assistant or executive assistant.

An agenda gives the chairperson control over the flow of discussion, the issues covered and the attendees responsible for reporting on or sharing specific information at the meeting. An agenda can also help keep the meeting within a predetermined time frame, controlling when issues are discussed.

The agenda contains a list of meeting activities, in order, starting with the opening or call to order and ending with the meeting's adjournment. The agenda commonly forms part of the meeting notice or is attached to it, so members receive all the necessary details at once.

A typical agenda briefly sets out what matters will be covered and in what order. If members are notified of the business to be conducted at the meeting, then the meeting must be confined to dealing with those matters. Any new agenda items raised during a meeting should be put on the agenda for the next meeting. This allows members time to consider matters properly and avoids disadvantaging members who are not in attendance at the meeting and therefore unaware of the new business.

When writing a meeting agenda:

- clearly state the meeting purpose
- detail the issues to be discussed
- prioritise the order in which things are best discussed so the meeting outcomes can be achieved
- define a time frame for each issue to be discussed
- structure the agenda as a guide to prepare invitees and control the proceedings.

**Example**

**Meeting agenda template**

**Project meeting agenda**

<b>Project name</b>			
<b>Date</b>		<b>Time</b>	
<b>Facilitator</b>		<b>Location</b>	

**Attendance requested**

<b>Name of attendees</b>	

**Agenda**

<b>Topic</b>	<b>Staff member</b>	<b>Allocated time</b>

## Example

### Disclaimers

Disclaimers inform recipients about what they can and cannot do with the emails sent from your company. Below are a few examples of email and newsletter disclaimers you may use.

#### Confidentiality

The content of this email is confidential and intended for the recipient specified in the message only. It is strictly forbidden to share any part of this message with any third party without the written consent of the sender. If you received this message by mistake, please reply to this message and follow with its deletion, so that we can ensure such a mistake does not occur in the future.

#### Security

[Your company] puts the security of the client at a high priority. Therefore, we have put efforts into ensuring that the message is error and virus free. Unfortunately, full security of the email cannot be ensured as, despite our efforts, the data included in emails could be infected, intercepted or corrupted. Therefore, the recipient should check the email for threats with proper software, as the sender does not accept liability for any damage inflicted by viewing the content of this email.

#### Contracts

This quotation request is sent to compare available offers and does not imply entering into a legally binding contract.

#### Environmental

Please do not print this email unless it is necessary. Every unprinted email helps the environment.

## Disclaimers continued...

### Employee liability

The views and opinions included in this email belong to their author and do not necessarily mirror the views and opinions of the company. Our employees are obliged not to make any defamatory clauses, infringe or authorise infringement of any legal right. Therefore, the company will not take any liability for such statements included in emails. In case of any damages or other liabilities arising, employees are fully responsible for the content of their emails.

### Email disclaimers in newsletters

- You have received this mail because you have subscribed for a newsletter at [your website's address]. You can always unsubscribe from our mailing list, by clicking on Unsubscribe. You can also reply to this message, including 'Unsubscribe' in the topic.
- This message is sent to you because your email address is on our subscribers list. If you are not interested in receiving more emails like this one, just hit Unsubscribe.
- Thank you for subscribing to our newsletter. [Your company name] team will work hard to deliver good-quality information in the fields you have specified upon subscription. However, if you decide that you no longer want to receive such emails from us, feel free to click the link below. Click here to unsubscribe.

## Practice Task 2

### Question 1

---

What are the key features of a business letter?

### Question 2

---

Which should be covered in a meeting agenda? Tick all that apply.

- When the meeting will be held
- Who has been invited
- What refreshments will be served
- Key points to be raised

### Question 3

---

What are written procedures used for?

## Question 4

---

Which of the following are types of business document formats? Tick all that apply.

- Memoranda
- Journals
- Business letters
- Agendas
- Newsletters

# 1C Establish methods of communication and key points

---

Your first decision about the method of communication you use will be whether it is appropriate to use a formal or informal style of written communication.

Most business documents will be written 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.

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

## Methods of communication

It is easy for most people to communicate in one way or another, but it takes skill to communicate effectively.

There are several ways people can communicate, and the method depends on the intent of the message: whether the message is intended for internal or external stakeholders. Video conferencing and social media are some of the newer ways that people are communicating in their personal lives as well as professionally.

Here are some methods for communicating in written documents.

### Written communication

- Written communication consists of traditional paper-and-pen documents and letters, text chats, emails, typed electronic documents, reports, SMS and anything else that may be conveyed using written symbols, like language.
- Such methods of communication are indispensable for any formal business communication and for legal instructions.
- Written communications may include formal business proposals, press releases, memoranda, contracts, brochures and handbooks.
- Social media is also a form of written communication. It can be an effective tool in the workplace for communicating between locations, departments and employees if they have a staff social medial page.
- Email is an excellent tool with which to share information with multiple staff at the same time; it also functions as a documented record of conversation.

### Visual communication

- This involves the communication of information by using visual aids, which can also be used in written communication, including:
  - graphic design
  - charts
  - graphs
  - illustrations
  - pictures.

## Formal and informal communication

During the workday, people in an office communicate in different ways, and this may be formal or informal.

Formal written communication is where there is a clear process or line of communication that needs to be followed. For example, formal communication may include a letter sent to a customer or a memorandum informing staff of a change in policy

Informal communication may be a general email discussing a task with a colleague or to a staff member requesting their work mobile number.

Which style to use will depend on the task you need to complete, the purpose of the communication and who you are communicating with.

## 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.

Passive	The report was written by John Smith
Active	John Smith wrote the report
Passive	The materials you ordered were sent to you by our city branch
Active	Our branch sent the materials you ordered
Passive	The annual report was discussed by the Board
Active	The Board discussed the annual report

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

Do not 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 use of the plural, but you will need to find out what style your organisation prefers.

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

## Key points for inclusion

It is critical to know who your intended audience is. By following the 'who, what, when, why and where' protocol, you will ensure all areas are covered.

You know the purpose of the document you are going to write, you know the audience for the document and you know the 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 people 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 memorandum, how much do your readers already know? Do you need to provide some background information or not?

The 'who, what, when, why and where' protocol can be used to structure a written document.

<b>Who</b>	Who is your intended audience? If you are composing an email, what are the names and contact details of your intended recipients?
<b>What</b>	What is it you want to discuss?
<b>When</b>	If you want to set up a meeting, when (time and date) will that meeting or conversation take place? If there are items to be actioned, when do they need to be done by?
<b>Why</b>	Why do you need to discuss the situation?
<b>Where</b>	Where do you intend on meeting?

## Example

### Drafting a memorandum

Jenny has been asked to write a memorandum for her company to inform the staff of a policy change regarding the taking of annual leave. Jenny first asks her manager, in an email, for the exact details required so she can sequence the memorandum properly.

Jenny takes her time to draft the key information using precise language. She then sends a draft of the memorandum to the human resources manager to look over before she sends it out to all staff. The human resources manager looks at the document and sends Jenny an email stating that she has corrected some of the spelling, grammar and punctuation. Once this is fixed up, Jenny has the authority to send the memorandum to all staff.

## Practice Task 3

### Question 1

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Briefly explain three key points or alerts for inclusion when writing a business document.

### Question 2

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You need to explain the outcomes of a meeting where it was decided an internal policy would be changed. Which method of communication would you use and why?

- Email
- Memorandum
- Letter
- Procedure

## Summary

- Determine your audience and understand the purpose of the document.  
Be inclusive.
- Contextualise documents to your audience's needs while following organisational procedures.
- Follow a company style guide for consistency.
- Focus on the structure and style of the document.
- Understand the various methods of distributing and communicating information, including verbal, written, oral, face-to-face, non-verbal, physical non-verbal and visual forms of communication.
- Maintain the confidentiality and security of all documents.
- Be aware of the environmental effect of printing.
- Determine whether the document is formal or informal.
- Use active and inclusive language in your documents.

# Learning Checkpoint 1

## Plan simple documents

### Part A

1. Why is it important to determine your audience before you write a business letter?

2. Which of the following statements relate to the format, style and structure of a professional document? Tick all that apply.

- Brand history
- Mission statement
- Logo use
- Word count
- Type style

3. What does active language have to do with communicating appropriately when writing a business letter?

4. Draw a line to match each term to its purpose for written procedures.

- |   |  |
|---|--|
| » Avoid errors and manoeuvre through incidents and problems | » Policies and procedures provide one means of proof that you have considered and implemented controls on activities   |
| » Streamline internal processes                             | » Having written procedures can provide a structure for continual improvement  |
| » Ensure compliance   | » The best processes should be captured, and these provide the most efficient path for day-to-day activities   |
| » Increase accountability, training and responsibility      | » Policies and procedures proactively anticipate problems and provide a structure for avoiding troubles or dealing with an immediate problem. Check spelling and grammar and ensure the structure of the document is solid and it is easily readable |

5. When writing a meeting agenda, whom will you need to seek information from?

## Part B

Read the case study below and then answer the questions that follow.

### Case study

Mandy works in a school office. The school principal, Mr Collins, asks Mandy to organise an appointment for him to see Mr and Mrs Jones. The principal is available any day other than Thursdays. Mr Collins is concerned that Mr and Mrs Jones's daughter, Sally, had complained to the teacher that she was being bullied; however, Sally will not give the name of the offender.

Mr Collins wants the issues outlined in a written document to the parents, specifically whether Sally has reported any incidents of bullying to her parents or whether they have noticed any change in her attitude to school. Mr Collins 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. What kind of written document should Mandy choose and what does Mandy need to consider when writing it? Select all that apply.

- A business letter is an appropriate way of communicating with the student's parents about this issue.
- Mr and Mrs Jones will be the audience, and may be upset to find out their daughter is being bullied.
- Writing in a passive voice will make the letter seem more personal.
- Mandy needs to consider any policies or procedures that concern written communication to parents.

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

3. Write the main section of the letter (do not worry about the address etc.).

A large, empty rectangular box with a thin blue border, intended for the student to write the main body of a letter. The box is centered horizontally and occupies a significant portion of the page's vertical space.





## Topic 2 | Draft simple documents

- 2A Draft a document to communicate key points
- 2B Check the draft meets document requirements
- 2C Obtain additional information required

## 2A Draft a document to communicate key points

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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 develop a draft document to communicate key points and obtain and include any additional information that is required.

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, consisting of several paragraphs, which describes the information in detail
- a conclusion summarising the key points and indicating any outcomes, recommendations and actions to be taken.

### Starting to write

A good way to start writing is to put your key points into sentences and paragraphs.

At this point, you should not worry too much about whether 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. This is not the finished product. Put everything you think you need to include down on paper. Do not 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.

Check you have included all your key points and not omitted anything important.

## Editing your documents

Ensure that you are always looking over and editing your documents prior to sending them out. You need to ensure the spelling, grammar and sentence structure are appropriate for the intended audience and get your point across effectively.

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

Use the list below to check your document's progress.

<p><b>1. Does the document have a clear beginning, middle and end?</b></p>	<p>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.'</p> <p>The middle of the document should include your key points. This may be only a few sentences or, in the case of a report, it may be quite lengthy.</p> <p>The end of the document should sum up your message clearly. For example:          'Thank you for your inquiry.'</p>
<p><b>2. Have you remembered to write using active language?</b></p>	<p>Active language starts sentences with the person who is doing the action. For example:          Passive: 'A new system for processing leave forms was announced by the manager.'          Active: 'The manager announced a new system for processing leave forms.'</p>
<p><b>3. Are the points in a sensible order?</b></p>	<p>Do the points follow on from each other in a logical order? Look at this example. How would you change it?</p> <ol style="list-style-type: none"> <li>1. We will discuss the new payroll procedure at the meeting.</li> <li>2. In July, we will introduce a new payroll procedure.</li> <li>3. The meeting will take place at 10am on Monday.</li> </ol>
<p><b>4. Have you written in plain English?</b></p>	<p>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.'</p>

<p>5. Look at the length of your sentences. Are they all the same length?</p>	<p>Varying your sentence length makes a document more interesting for the reader. For example:</p> <p>'On Thursday 15 August we are organising an emergency fire drill. There will be a meeting at 9.30am 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.'</p>
<p>6. Are the sentences too long?</p>	<p>Sentences should only have one main point. For example, this sentence is far too long and contains too many ideas:</p> <p>'The work health and safety audit that was recently conducted at our office by external consultants Winslow &amp; 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.'</p>
<p>7. Have you repeated words?</p>	<p>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?</p> <p>'The customer feedback we recently received from a number of customers highlighted the importance of satisfying customer needs.'</p>
<p>8. Have you used too many adjectives and adverbs?</p>	<p>Overusing adjectives and adverbs (such as 'usually', 'very' or 'quite') can lead to unnecessarily long sentences.</p> <p>Look at this example. How would you change it?</p> <p>'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.'</p>
<p>9. Have you said the same thing more than once?</p>	<p>Repeating information can make a sentence longer than it needs to be. How would you rewrite the following sentence?</p> <p>'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.'</p>
<p>10. Check the number of times you have used 'that'.</p>	<p>In many cases, 'that' can be deleted. For example, 'that' can be deleted in this sentence:</p> <p>'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.'</p>
<p>11. Do an initial spelling and grammar check, using your software's spellcheck function.</p>	<p>Using the spellcheck function highlighted three errors in the following sentence:</p> <p>'The manager aksed the receptioist to gave the report to her.'</p> <p>Mistakes in spelling will be underlined in red (e.g. 'aksed' and 'receptioist'). Any grammar mistakes will be underlined in green (e.g. 'gave').</p>

## Checklist for a draft document

Using a checklist when drafting a document can be very handy: it will allow you to follow through and not forget any key points. Below is a draft document checklist you may want to follow.

### 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?

## Practice Task 4

### Question 1

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Number each step below from 1 to 3 in the order they should appear in in a document.

- A conclusion summarising the key points and indicating any outcomes, recommendations and actions to be taken
- The main text, consisting of several paragraphs, describing the information in detail
- An introduction describing what the document or message is about

## Question 2

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List three things you need to do when drafting a document.



## 2B Check the draft meets document requirements

Quality assurance document control is the process used in the management, coordination, control, delivery or support of an item required for quality assurance purposes.

Establishing document procedures (ISO 9001:2015):

- Approve documents for adequacy prior to issue
- Review, update as necessary, and reapprove documents
- Identify the changes and current document revision status
- Make relevant documents available at points of use
- Ensure the documents remain legible and readily identifiable
- Identify external documents and control their distribution
- Prevent obsolete documents from unintended use
- Apply suitable identification if obsolete documents are retained.

### Use appropriate language and style

Language and style are not the only ways to communicate through documents; your tone can also be transmitted through the documentation.

Documents should be written clearly and concisely so all users can understand what they are meant to do. Use language other people are likely to understand. If the instructions or details are too technical, many people may decide the process is too difficult for them. Although it may be impractical to prepare different instructions for different users, you may need to develop simple instructions for those people who find it difficult to understand technical instructions or for those whose first language is not English. Write instructions and then re-read them to determine how they can be written more simply.

## Evaluate document quality to meet organisational standards

Each organisation will have its own style you will need to follow when it comes to preparing documents. It is critical you understand this before presenting any documents.

Managers must ensure that documents produced by their team or individuals they are responsible for meet the quality standards set down for the production of documentation in the organisation's policies and procedures manual, as well as legislative requirements where necessary. Templates may need to be redesigned or removed if they do not meet documentation standards. Quality control can be monitored by regularly comparing the documents staff produce with master documents. It is also important to regularly evaluate staff knowledge and skills and offer training to address identified skill deficiencies.

The checklist below can help you determine whether your draft document meets organisational requirements.

Document:		
Task	Completed	
	Yes	No
Used the required template		
Followed the style guide (fonts, heading styles, footers, headers etc.)		
Used an appropriate software program		
Used the recommended language style, non-discriminatory language and a suitable tone		
Ran a spellcheck to check for any spelling or grammatical errors		
Made the required number of copies, if printing		
Made a backup of the document		
Gained copyright permission where relevant		
Asked an authorised person to sign the document (when appropriate)		
<b>Suggestions</b>		

## Example

### Organisational standards for documents

What documents are produced for in-house use only?

- Can the number of these documents be decreased or are they all still serving their purpose?

Who are our clients?

- Who do we send our documentation to?  
Will we still be dealing with them in the future?  
Are these internal-only documents?

What format do our clients (or we) require information to be presented in?

- Should the information be presented on paper (e.g. book, booklet, flyer, memorandum, letter, poster or brochure), electronically (e.g. email, pdf, spreadsheet or presentation) or both?

## Practice Task 5

### Question 1

Explain actions you could take to check that the format of the document is suitable for its purpose.

## Question 2

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List three different presentation formats for documents.

## 2C Obtain additional information required

When you have finished the initial rough draft, you need to look it over and decide whether more information is needed.

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 may need. What mistakes could be made, or what could happen, if the information were 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 memorandum 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 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.

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 make the information easier to understand? These are the sorts of questions you may ask as you read through your document.

Use the following checklist to verify the information contained in your document:

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

## Including additional information

Depending on the context, you may be asked to obtain additional information to use in your document.

You may need written permission to use information in your document if it is about another person or it may harm their reputation. In this case, you would need the person providing you with the information to sign a 'disclosure form'. This is to cover yourself and the business so there are no ramifications from using the information (e.g. a lawsuit or defamation of character). People need to be aware of and consent to their details, including name and title, being used in any documents. This applies to people both internal and external of your organisation.

### Disclosure of Personal Information Form

I, \_\_\_\_\_, whose date of birth is \_\_\_/\_\_\_/\_\_\_, authorize 4D Pharmacy Management Systems to disclose my personal health information to the person(s) or entity(ies) listed below. For purposes of this authorization, my personal health information includes personal demographic information, prescription history and therapy, future prescription activity, my prescription coverage, and the status of any reimbursement for medications or copayments I have submitted to 4D. I realize that this authorization only permits the disclosure to the party(ies) listed below. The information used or disclosed in accordance with this authorization may possibly be re-distributed by the recipient, and such action is not allowed under this authorization or protected by the HIPAA Privacy Legislation. I understand that I may revoke this authorization by submitting a letter in writing stating my revocation to 4D Pharmacy Management Systems. 4D Pharmacy Management Systems will not condition treatment, payment, enrollment or eligibility on the authorization provided here.

This disclosure is for the purpose of: (for example, "at my request", "to facilitate judicial proceedings" etc.)

\_\_\_\_\_

(Please note: if no purpose is indicated, this authorization will be considered to be made at your request)

#### **Disclosure may be made to:**

Name(s): \_\_\_\_\_

Contact Information (if applicable): \_\_\_\_\_

Please note any comments or restrictions related to this Authorization:

\_\_\_\_\_

Expiration Date of Authorization: \_\_\_\_\_

(if none is listed, authorization will expire 12 months after signature date)

Member Signature: \_\_\_\_\_ Date: \_\_\_\_\_

or Signature of Legal Representative: \_\_\_\_\_ Description of Authority: \_\_\_\_\_

## Practice Task 6

### Question 1

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Which of the following statements about the things you need to check to verify the information in your documents are correct? Select 'Yes' or 'No' for each one.

- |  |       |      |
|--|-------|------|
| a) That the information is current, relevant, accurate and clear | » Yes | » No |
| b) The appropriate resources have been consulted                 | » Yes | » No |
| c) You can be biased regarding graphics                          | » Yes | » No |
| d) Formatting does not matter                                    | » Yes | » No |
| e) You should never use graphics                                 | » Yes | » No |

### Question 2

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Why do you need to get a disclosure form signed if you are using information about a person or another business?

## Summary

- Ensure you identify who the document is for. Who is your audience?
- When drafting a document, start with key points.
- Ensure your documents are edited and checked for spelling, grammar and sentence structure. They should go through the quality assurance process.
- Follow a checklist when drafting a document for the first time.
- Use the appropriate language and style for your audience.
- Evaluate document quality to meet organisational standards.
- When drafting a document, re-read it and check whether more information needs to be included before the document is sent out. Is there someone else you should have spoken to?
- Review your draft and have another person read it for readability, as well as whether more information is needed.

## Learning Checkpoint 2

### Draft simple documents

#### Part A

1. How should you manage your key points for a document?

2. List three things you need to consider in terms of your writing while drafting your document.

3. Which of the following statements relate to establishing document procedures?  
Tick all that apply.

- Approve documents for adequacy prior to issue
- Identify the changes and current document revision status
- Ensure documents remain legible
- All documents must be double spaced
- Prevent outdated documents being unintentionally used

4. What does it mean to write documents clearly and concisely so users can understand what they are meant to do?

5. When deciding whether you need to gather more information, what is one question you might ask yourself?

## Part B

Read the case study below and then answer the questions that follow.

### Case study

Jeremy is working for a theme park as a ride attendant. He has been working there for just over 3 years. Jeremy was nominated by his peers and won 'Employee of the Year'. Jeremy is extremely excited to be recognised for his achievements, because he loves working with both customers and his coworkers. Jeremy's manager has taken a few photographs of him during his work shift and wants to put them up on the company website. Jeremy has been asked to write a blurb about his time with the company and what he likes best to add to the pictures on the website.

1. What does Jeremy's manager need Jeremy to sign before the photographs of Jeremy can be used on the company website?

2. What information should Jeremy ask his manager before drafting his blurb?

3. What could Jeremy include in the draft blurb he submits to his manager?

4. What does Jeremy's manager need to check when reviewing the draft blurb Jeremy has written for him?





## Topic 3 | Finalise simple documents

- 3A Proofreading a document
- 3B Making changes to a document

## 3A Proofreading a document

The person proofreading the draft will often find things you have missed in your first draft.

Proofreading involves checking written documents for any errors in spelling, grammar or punctuation. A document should be proofread several times.

When creating a business document, it may be necessary to have your supervisor or a colleague proofread your document to ensure it is error free and follows your organisation's guidelines or style guide. Proofreading will help catch any remaining grammatical errors, typographical errors and punctuation mistakes. It will also help ensure that all the appropriate information has been included in your document.

When your supervisor or colleague examines your document, they could indicate corrections that need to be made to grammar, spelling, punctuation or ways of expression. They may have preferences for the way ideas or opinions are expressed, and may want you to change the tone of your writing to better fit the document's purpose and audience.

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 the document is ready to become the final version. You may have to get the person proofreading your work to approve the final copy of your document. If you are producing a letter, you need to get the relevant person's signature on the final copy.

When proofreading documents, such as meeting minutes, a proofreader may find that:

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

## Steps to proofreading

If you follow the simple steps listed below, you will be able to ensure that your documents are going to be clearly laid out, written in plain English and look professional.

Remember, feedback about your document is only constructive; do not take it personally.

<b>Step 1</b>	Use your computer's spellcheck and grammar check functions, or used a spellchecking program such as Grammarly
<b>Step 2</b>	Proofread a soft copy of the document (on the computer)
<b>Step 3</b>	Proofread a hard copy of the document (on paper, printed out), because you are likely to see different things to those you see on screen
<b>Step 4</b>	Ask another person to proofread your document (e.g. a supervisor or colleague)
<b>Step 5</b>	Edit your document if required

## Proofreading techniques

The following list explains the strategies that are recommended for proofreading. Once you have created a document you should follow these strategies.

Step away and focus
<ul style="list-style-type: none"> <li>Write the document, then take a step away before you proofread it; take a break for 24 hours if you can.</li> </ul>
Print a hard copy of your document
<ul style="list-style-type: none"> <li>Many people find it easier to proofread a physical document. Printing the document makes it easier to read and allows you to proofread away from your computer.</li> </ul>
Read your document out loud
<ul style="list-style-type: none"> <li>Good proofreading is done slowly. Simply reading a document normally allows your brain to fill in gaps and fix errors in your mind and skip them on the page.</li> <li>Reading aloud ensures that each word and punctuation mark is verified. It also highlights awkward sentences, because they will sound more awkward when read out loud than on the page.</li> </ul>

### Ensure your document aligns with your company style guide standards

- Most companies have style standards for external documents. Ensure you have these guidelines close at hand while proofreading.
- Company guidelines may range from font choice to preferred spellings to margin size and more. Such style guides ensure consistency across an organisation.

### Remove excess words

- Business writing is concise and direct. Excess words, like adjectives or adverbs, can detract from the message.
- Review the text for unnecessary words that do not add value to the text. In addition, check for the excessive use of words and any accidental repetition of words, which can be missed by spellchecking programs prior to proofreading.

### Explain or remove jargon

- Specialised terminology or acronyms should be used sparingly, if at all, in business writing. When used appropriately for the reader, these terms must still be explained.
- Generally, the first mention of an acronym is spelled out completely with the acronym following in parentheses. An unfamiliar technical term should be explained in the text before being referenced.
- Terms that are difficult for the reader should be removed and replaced with more accessible wording.

### Check your sentence structure

- A proper sentence must have a subject, a verb and express a complete thought. This seems simple, but sentence fragments and run-on sentences can sneak into an otherwise great text.
- Review each sentence for proper structure and punctuation.

### Review the flow and sequencing

- One pass of the document must be a high-level review. This overview checks the organisation of the document to ensure it has proper flow and sequencing.

### Use technology

- Software and technology are your friends when it comes to proofreading. MS Word and Google Docs have their own spellchecking features, and there are also specialised programs and apps available, such as Grammarly, that you can use to check your documents.

#### Ask a colleague or supervisor to check your document

- You can receive an objective opinion with regard to the document inclusions.

#### Check homonyms (words with different meanings but the same spelling)

- When a word sounds right, the quick reader can mistake it for being correct. Homonyms are a painful but important item to check.
- Writing *accept* when you meant *except* can be embarrassing, or even disastrous, in business communication.

#### Check apostrophes

- Apostrophes are often placed incorrectly. Apostrophes are almost never used for plural terms, but somehow they often appear as such.
- Although mixing 'companies' with 'company's' may not be disastrous, it is confusing and can look unprofessional.

#### Check your facts

- Employees, colleagues and clients rely on business communications for information and decisions. Therefore, these communications need to be accurate. Whether it is the spelling of a client's name, the location of the sales division or the policy sheet, each detail must be correct.
- Fact checking these details will ensure the document is valuable and useful.

#### Verify numbers, times and dates

- Numerical information is often the most critical and the easiest to mistype.
- Each number must be verified. A misplaced decimal point or zero in a budget line can be a grievous error.
- Times should be checked to ensure they are correct, including the time zone.
- Dates must be correct to the day of the month and the week.
- Triple checking numbers is not an over-the-top habit.

#### Verify names

- Writing a staff member's, colleague's or client's name incorrectly or completely wrong is simply disrespectful. It can also lead to confusion, but, more importantly, it shows poor attention to detail to the most important people: the reader or subject of the business communication.

#### Test hyperlinks and telephone numbers

- Website links and telephone numbers are very handy. However, it can be very frustrating if they are incorrect.
- In the proofreading process, click on each hyperlink, type in each web address and dial each telephone number included in the document to ensure readers will be directed to the correct resource.

## Proofreading versus copyediting

**Proofreading is the final step in the process of writing a business document.**

Proofreaders do not suggest major changes to the text; rather, they look for minor text and formatting errors and confirm the material is ready for publication. Copyediting and proofreading are separate tasks; copyediting is what happens when you are first drafting and rewriting your document.

### Copyediting

The tasks involved in copyediting include checking written material for grammar, spelling, style and punctuation issues before the document is ready for proofreading. A copyeditor may also rewrite the text, if necessary, to fix any problems with transitions, wordiness or jargon, and to ensure the style of the piece fits with the publication. This work is known as 'revision'.

### Proofreading

When the material is nearly a finished product, meaning it has been edited, laid out and designed, the proofreader searches for typographical errors. The proofreader works with a hard copy of a finished product, or a proof (hence the term 'proofreading'). Proofreaders do not suggest major changes to the text; rather, they look for minor text and formatting errors and confirm the material is ready to be published.

Your supervisor or colleague can proofread your document for you; they are more likely to pick up any mistakes because they are a fresh set of eyes.

## Tips for proofreading

It is important to take the time out to proofread your documents so your finished document looks professional.

Start by reading your document line by line. If you are reading a hard copy, you may use your hand or something solid to cover the rest of the content, leaving only two to three words visible at a time. Write notes on the hard copy, or add comments in the soft copy of your document, of all the possible errors related to grammar, punctuation, syntax and spelling.

The following is an example of a resume that has not been proofread:

### **Adam Weston**

123 Example Stret  
Melborne, VIC • 0411 111 111  
a.weston@email.com

#### **SUMMARY**

Customer-oriented fullsales cycle SMB Account Executive with 2 or three years of experience maximizing sales, fullfiling quotas, and building trusted, loyal relationships with high-profile clients.

#### **EDUCATION**

MOnash UNIVERSITY  
Aug '10 - May '14  
Bachelor of Buisness Administtration

#### **EXPERIENCE**

T.W. Associates, Account Executive  
Jun '16 - Current

- Agressively hunt and prospect for new business opportunities by making 50ish daily cold calls and following up – on leads in order to ensure pipeline sufficiency
- Built and
- nurtured 20+ strong customer relationships with local businesses within first 6 monthss, accounting for about \$50K I think in revenue
- Explain complicated software features to senior-level clients through effective product demos conducted in-person, over the phone, and via Skype

CRANE & JENnKINS, account executive.

**CURRENT**

- Leveraged cold calling and EMail prospecting (~3,000 emails and ~500 calls monthly) to generate leads
- Consistently performed among top 5% of salespeople in region (out of 150+ account executives) each year
- Exceeded salesgoals each quarter - regularly achieving 115%+ quota attainment - while maintaining optimal customer service record
- Increased revenue for Cloudpoint account by 32% and Essence Security account- by 38per cent

**SKILLS**

- Client relationship management
- Lead generation/qualification
- Product demos
- Needs analysis

## Practice Task 7

### Question 1

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When would you seek feedback on your draft document and from whom?

## Question 2

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What will proofreading hopefully be able to catch in your document?

## Question 3

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When proofreading, should you read your document out loud? If so, why?

## 3B Making changes to a document

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After a document has been proofread, you should take the objective feedback provided and make any necessary changes.

When you send a document off to be proofread, it will often come back with 'mark-ups' made on the original document. If the hard copy has been proofread, the mark-up will show you what changes need to be made. If the reviewer has proofread a soft copy of your document using MS Word, for example, the 'track changes' feature can be used and the reviewer can make changes to the document themselves. You can also use the track changes feature to highlight differences between the original document and the updated document.

When you receive a soft copy of a document with tracked changes made by the reviewer, you can choose to accept or ignore the changes. This can be done individually for each change or, if you are happy with the overall result of the document, you can choose to 'accept' all changes in MS Word. This will automatically accept the suggested changes and change the final document.

### Once you have made changes, proofread again

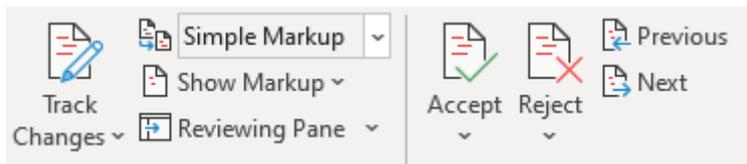
Just because you have proofread your document or had a colleague or supervisor check your document, this does not mean the document is ready to be published or sent out.

After the first round of proofreading, make the necessary changes and then take a step back and re-read the document again. You may be in a hurry to get the document out, so you make the changes and do not read the wording again. This is the biggest mistake you can make. If you have taken the time to create a professional document, you want to ensure it is right before publishing it or sending it out. Your reputation can be ruined by a wordy, unreliable document.

## Software for mark-up

There are several programs available that illustrate document mark-up.

Below is a snapshot from MS Word:



The mark-up section is usually found under the 'Review' tab. You have the option to show simple mark-up or all mark-up. You can also accept or reject changes at the click of a button. You can scroll through and only accept a few changes, or you can accept as many as you like.

### Example

#### Edited excerpt

Thanks for the chance to work with you over the past 1.5 years. We are not happy with your decision. But will respect your right to terminate the contract.

Trying to make our service better, it would be helpful to know what led to this decision. If you change your mind at a later time, please think of us.



ORIGINAL

GRAMLEE APPROVED

Thanks for ~~the chance~~ giving us the opportunity to work with you over the past ~~1.5 years~~ year and a half. ~~We are not happy with your decision. But will~~ Though we are sad to see you leave, we respect your ~~right~~ decision to terminate the contract.

~~Trying to make~~ In an effort to improve our services ~~better~~, it would be helpful to know what led to ~~this your~~ decision. ~~If you change your mind at a later time, please think of us.~~ Should you need our services again in the future, please don't hesitate to contact us!

## Practice Task 8

### Question 1

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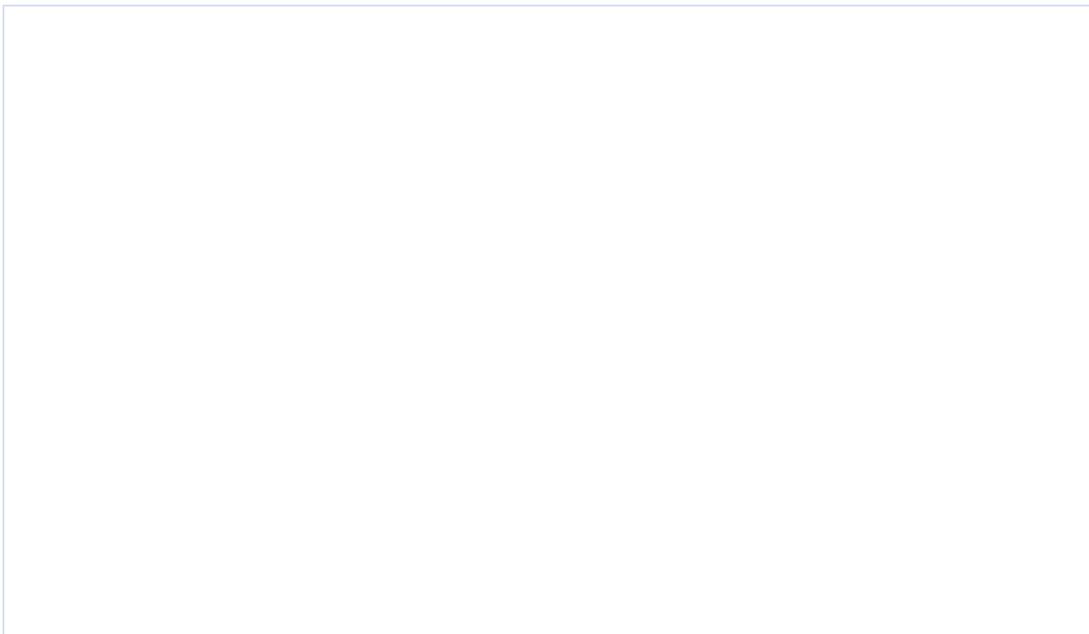
Explain what 'mark-up' is on a document.



### Question 2

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After the first round of proofreading has happened, what should you do next?



## Summary

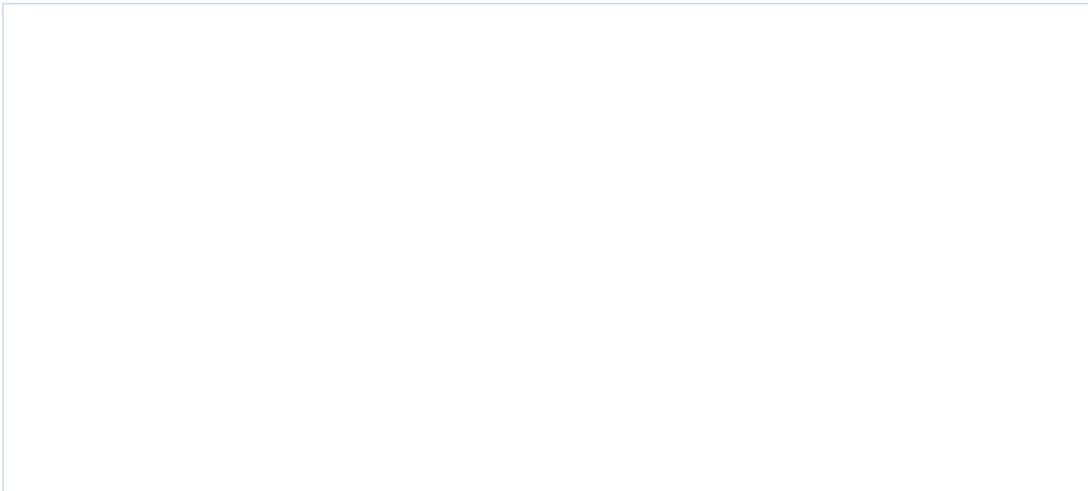
- Ensure you always proofread your document. You may find additional information that is required after the first edit.
- Proofreading will catch any remaining grammatical errors, typographical errors and punctuation mistakes.
- Copyediting and proofreading are separate tasks. Copyediting occurs when you are first drafting and rewriting your document and may involve rewriting of the text to fix any problems with transitions, wordiness or jargon.
- Use the five-step process to proofread your document.
- Techniques for proofreading:
  - Step away and focus
  - Go through a printed version of the document
  - Read the document out loud
  - Ensure the document aligns with the company style guide
  - Remove additional unnecessary words
  - Remove jargon
  - Check the sentence structure
  - Review document flow
  - Ask another person to review the document for you.
- Consider the objective feedback provided by the proofreader and make the required changes to your documents.
- After the changes have been made, proofread your document again.
- Digital software can be used for marking-up a document.

## Learning Checkpoint 3

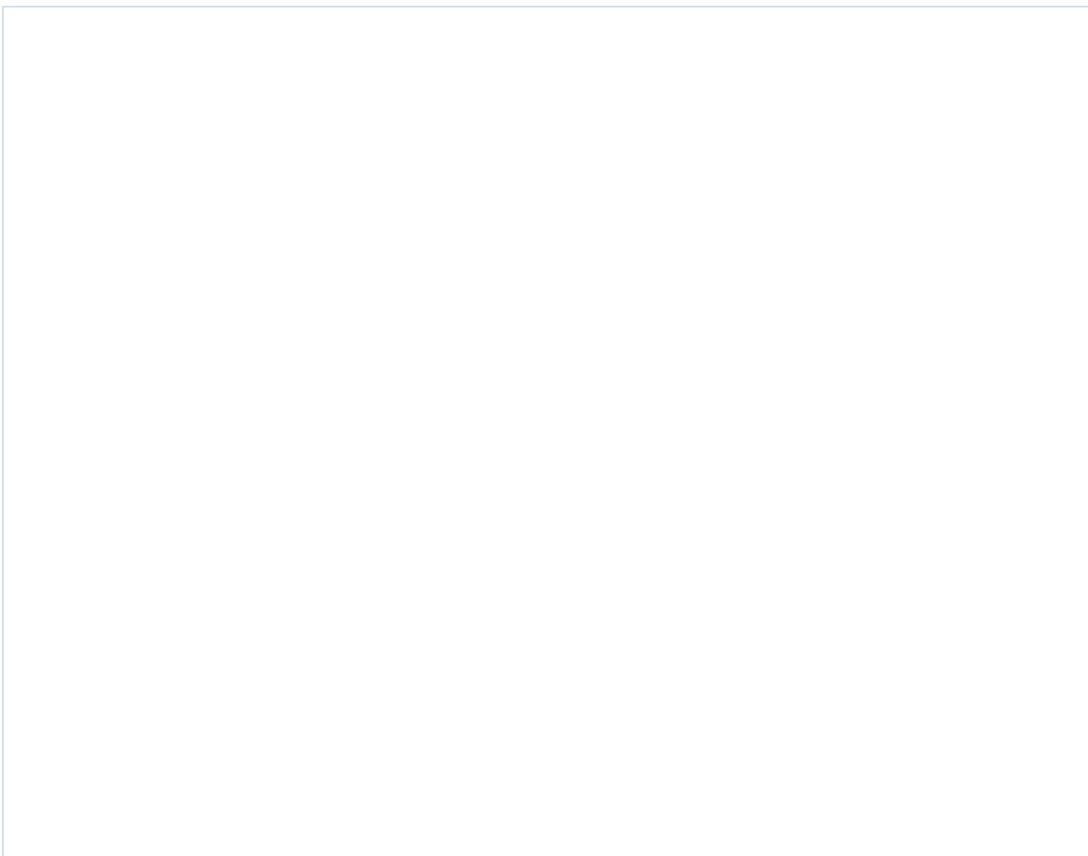
### Finalise simple documents

#### Part A

1. List the five steps to proofreading.



2. List and explain what three proofreading techniques are.



## Part B

Read the case study below and answer the questions that follow.

### Case study

Mr and Mrs Smith are staying at a hotel and their luggage has been lost at the airport. Mr and Mrs Smith have gone to their hotel and were told they would be contacted when their luggage was found. Mr and Mrs Smith go down to the restaurant for an early dinner and, when they return to their room, a note has been placed under their door that reads:

Dear Mr and Mrs Smith,

The airlines did called, and they have found your luggage. It will be delivering to the hotel around 8pm tonight. When it arrives, we will brought it up to your room straight away.

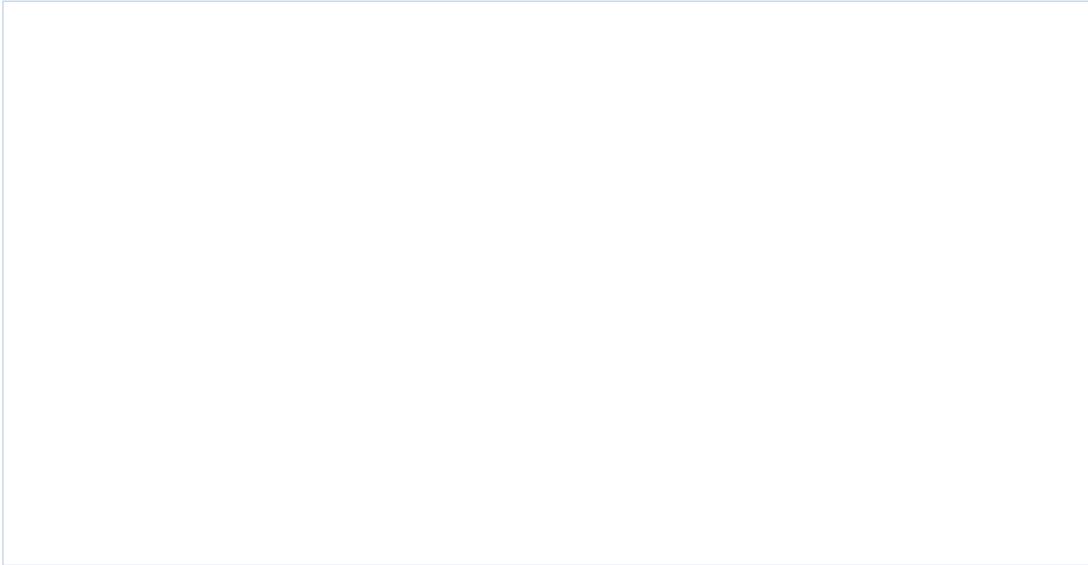
If you need anything in the means of toiletries in the meantime, let us know at reception and we can provide a few things for you.

Kind regards,

Reception

1. In reading this case study, do you think the note left for Mr and Mrs Smith was proofread before it was sent up to the guest's room? Why or why not.

2. Proofread the letter above and note the changes to spelling, grammar and punctuation that need to be made. Re-write the letter with the changes you have suggested.



3. Type the original case study letter into MS Word or an equivalent program. Use the spellcheck function to proofread the document and accept the changes. Note any differences to your rewritten letter.