

MODULE 2

Planning to Write

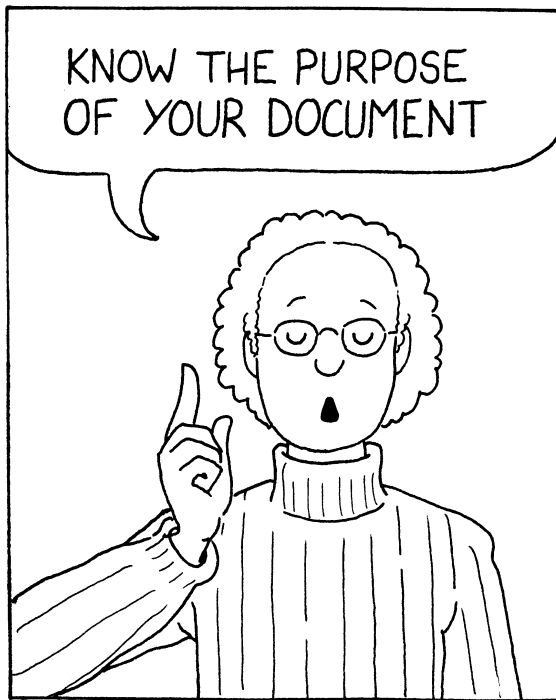
A lot of writers just start writing without a lot of thought about where they're going. For short documents, like emails and memos, this isn't usually a problem. But for longer documents, such as short reports or proposals, or worse, for manuals or long reports, the lack of a plan can force you to make major revisions to your document once it's been drafted. Not only is this more time consuming, but often the end result suffers.

Planning begins with asking questions about the purpose, objectives, and intended readers of your publication. Why am I writing this document? Who's going to read it and what information do they need? It's important to know the answers to these questions before you get started.

All writers, from time to time, suffer from writer's block—an inability to make significant progress with their writing task. Some writers just give up, hoping it'll be better the next day. Business writers, however, usually don't have that option—they've got to produce, because their job depends on it! Fortunately, there are time-tested techniques for making sure this doesn't happen to you—techniques like clustering and outlining.

In this module, you'll learn how to plan your document, and why the more you know about your readers, the better off you'll be. You'll also learn some techniques for generating and organizing ideas, and how to turn those ideas into a first draft—quickly.

Decide on your purpose



The first step in writing well is to ask yourself why you're writing. In business writing, we seldom write for the sheer joy of it—we usually have a specific purpose. We've got a reason behind our need to communicate something.

Explicit purposes

Consider the typical reasons why you write. Without a clearly defined reason for writing, it's difficult to write anything. How will you know what information to include or how much detail is needed? And it's not only important to clarify the purpose in your own mind, but also to make sure that your boss and others involved in the document agree.

Examples of explicit purposes:

- report a solution to a problem
- describe services available to customers
- interpret lab results
- provide instructions
- ask for permission
- initiate a new procedure
- order material
- change a course of action
- submit a bid
- ask for a proposal
- define a position on policy
- propose adoption of a plan
- thank a customer
- congratulate an employee
- announce a change

Implicit purposes

But writing can also have more subtle purposes that are more felt than expressed. These are sometimes referred to as *implicit* purposes. Most business writers will recognize some of these underlying purposes—they are a normal part of business communications. Can you relate to any of these purposes?

Examples of implicit purposes:

- to generate trust
- to persuade
- to deflect blame
- to establish your professional credibility
- to demonstrate your objectivity
- to generate business

Decide on your objectives

Sometimes business documents will have objectives—there’s something specific that you want to happen. If your document has specific objectives, write them down. Once you’ve finished, you can go back and see whether the document achieved its objectives or not. Establishing specific objectives is one of the ways we use to measure the success of our documents.

Examples of specific objectives:

- be awarded a contract (for proposals)
- get a job interview (for a resume and cover letter)
- allow people to complete a task successfully without help (a procedure)
- allow a technician to diagnose and repair a piece of equipment within a limited period of time (a repair manual)
- allow people to find something they’re looking for (a set of directions)



Warning Label Jamboree: text found on actual warning labels

On the bottom of a box of
Tesco’s Tiramisu Dessert:

“Do not turn upside down.”

On a Korean kitchen knife:

“Warning — Keep out of children.”

On a Japanese food processor:

“Not to be used for the other use.”

On Sainsbury’s Peanuts:

“Warning: contains nuts.”

On a Swedish chainsaw:

“Do not attempt to stop chain with your hands.”

On Marks & Spencer Bread Pudding:

“Product will be hot after heating.”

Understand your readers

Knowing your readers—your *audience*—is essential to writing well. Different audiences need different information. Identify precisely who you are writing to. If it's someone you know well, it's easy. If it's a single group of people (such as technicians), it may be a little harder. If you have a variety of different readers of your document, you have a challenge!

Find out as much as you can about your audience. If you can, go and meet them or give them a call. Find out who they are, what their interests are, what makes them tick. Follow them around until you understand their information needs—then write your document. This is often referred to as *user-focused* documentation, and is essential to effective business writing.

Exercise 5: Identify and profile your audience

Think about the various kinds of documents that you write and the people who read them. List 10 things you'd like to know about your readers.

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____
10. _____

Reading at work

Reading for work is different than reading for pleasure. When reading for pleasure, you usually start at the beginning, read carefully to savour the language, and read straight through to the end.

When you read to learn, such as reading a course textbook, you usually start at the beginning and read progressively through the book, even re-reading if you don't understand it. And you typically don't go on to the next section until you've mastered the previous one, since the later sections are often based on the earlier ones.

Not so for most business documents—particularly longer ones, like big reports and manuals. Very few readers will start at the beginning, and very few will read them cover to cover. Most will skim and scan through them, looking for topics of interest. For manuals, they're usually looking for information to solve a problem, answer a question, or complete a task.

Even for shorter documents, few people have the time to read them thoroughly. Think about all the things that you haven't read yet. How do you read business documents? Don't ignore this difference in reading styles—design your documents to make it easier for skimmers and scanners.



Techniques to help skimmers and scanners:

- Organize related information together in the same place (referred to as organizing *topically*).
- Divide the text into logical chunks (sometimes called *chunking*).
- Label each topic with a descriptive heading (up to three headings per page).
- Create a table of contents, and if the document is more than 50 pages, an alphabetical index as well.
- Use presentation techniques, such as bullet lists, numbered steps, tables, and diagrams, to communicate information more easily.
- Highlight key words and ideas.

Clustering

Clustering (sometimes called *mind mapping*) is a long-practiced technique for generating ideas. Many writers find it valuable during the early stages of planning as a stepping stone to a first draft. It can help you identify the topics for your document and think about the best way to organize them.

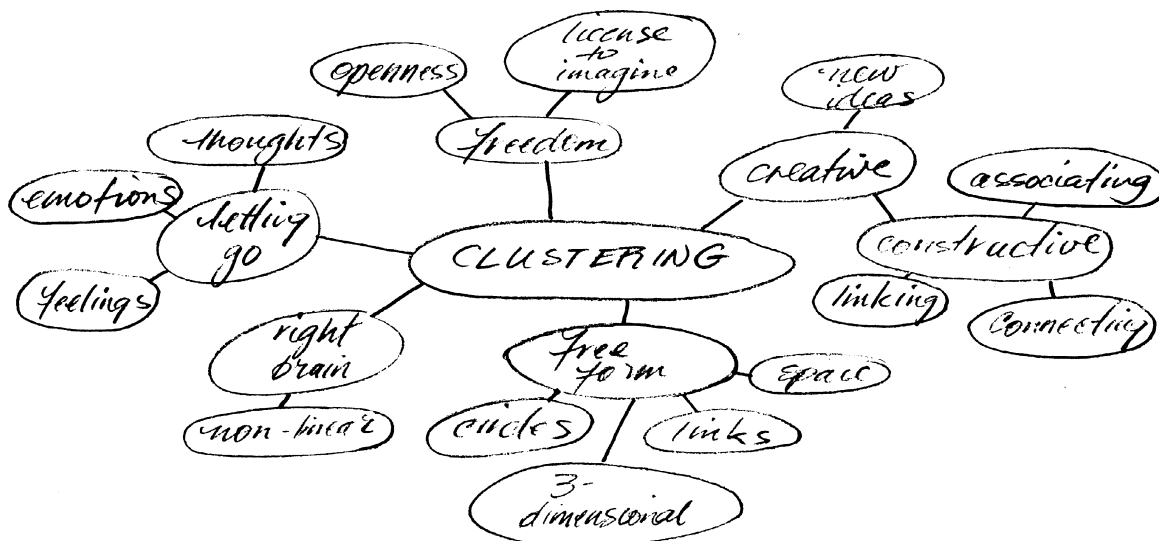
Start with a clean sheet of paper. Write the topic that you need to write about in the centre and draw a circle around it. Now sit back and focus on the topic. You may want to close your door and put your phone on call forward. When an idea occurs to you, don't be critical—write it down, draw a circle around it, and link it to the centre word.

After a while, if you're like most people, you'll have jotted down lots of ideas. Keep going until you can't think of anything else. Now you can sit back

and look objectively at your ideas, sorting them out and thinking about how they could be organized. Before, those ideas were drifting around in your head. Now they're down on the page where you can evaluate them.

Of course, it would be difficult to write using your cluster diagram at this point, because the ideas aren't organized yet. The next steps are to decide on the document hierarchy (sections and subsections, if appropriate) and the sequence of topics (what goes first, what goes next). Then you'll be ready to write.

Try creating a cluster diagram and see if it works for you. Most people find that it's worth the few minutes that it takes to create one.



Exercise 6: Create a cluster diagram for a personal style sheet

Imagine that you do a lot of business writing and want to prepare your own personal style sheet of conventions and standards that will apply to the documents you typically write. See how many possible topics you can identify that might be part of your personal style sheet. If you're unsure of what style sheets are, go back to page 10 on style sheets. Give yourself seven minutes.



Organize your ideas

Before you can write, you must decide the order of the topics. While clustering can help identify topics that need to be included, it won't tell you how to organize them.

To decide the best method of organization, consider the following:

- How will the information be used (read thoroughly or used as reference)?
- How is this type of information usually organized?
- How do my readers expect me to organize this information?
- How will my readers use this information (for example, to complete a task)?
- Are readers already familiar with this information or does it need to be carefully introduced and explained?
- What is the logical relationship between different parts of the information?

And just because one part of your document is organized a certain way, doesn't mean it all has to be. One section could be organized top down to explain things easily, while the following sections could be organized topically, or even alphabetically for easy reference.



Signs and Notices From Around the World:

Hong Kong Dentist

Teeth extracted by the latest Methodists.

Hong Kong Tailor

Ladies may have a fit upstairs.

Thai Donkey Ride

Would you like to ride your own ass?

Paris Hotel

Leave your values at the front desk.

Organize your document

Alphabetical

Sometimes it's best to organize information topically, provide a keyword heading, then sequence the headings alphabetically—just the way I've organized this section. This allows readers to find information quickly, which is why many reference manuals are organized alphabetically. Of course, if you only have a few headings, it's not much of an advantage since readers can scan all of the headings quickly. But alphabetically organizing information prevents any logical progression from one heading to the next, so it's a poor way to explain things.

Bottom up

The results of scientific experiments, lab tests, or anything done by objective analysis are usually presented *bottom up*—that is, the details are presented first, and broad conclusions or general statements are presented last. This reflects one of the principles of scientific work that we should not begin our evaluations with foredrawn conclusions. Investigation reports, feasibility studies, and analytical reports are usually organized bottom up—findings first, conclusions last.

One problem, however, with putting your conclusions last is that the end of your documents, particularly longer ones, is often more poorly read than the beginning. So to make sure that even your busiest readers see the conclusions, repeat them at the front in an *executive summary*.

Chronological

If the sequence of events is the most important aspect of the information, then organize it chronologically—in the order that events occurred or steps need to be done. Most documents that describe past events, such as investigative reports, are organized chronologically. Procedure manuals and other instructional documents also organize information chronologically, because procedure steps usually have to be done in a set order.

Most important to least important

Imagine receiving a letter that begins with trivial matters and concludes, almost as an afterthought, with something important. For short documents, like letters, memos, and emails, you'll want to begin with the most important topic first—to get straight to the main point. Then, in the space remaining, you can address related but secondary issues.

Random

Sometimes there isn't a good reason to organize information in a particular way. In this case, organize it randomly. The most common form of randomly organized information is the bullet list. Other than bullet lists, information is seldom organized randomly.

Top down

Descriptive information and introductions to new topics are usually organized *top down*—that is, they begin with broad, general statements and finish with the details (describing the forest before describing the trees). Use this method when you want to introduce a new topic, explain a process, or persuade the reader about something. Your high school essays were probably organized top down if they began with a general introduction (your *thesis*), then

moved into the details (your arguments). Paragraphs are organized top down if they begin with a topic sentence, which describes the general content of the paragraph, followed by specific details.

Topical

When you write, you may want to group related information together under headings that describe the topic. Organizing information topically ensures that your reader will find all related information together in the same place, rather than scattered throughout the document. As the author, you decide what the topical groupings are, but they should make sense to your readers. Other methods of organization can also apply to information that is grouped topically, because you'll have to decide the appropriate sequence for the topical groupings.

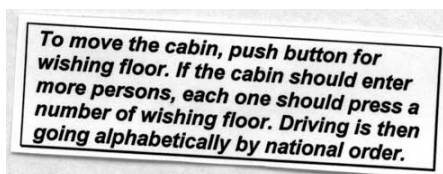


Signs and Notices From Around the World:

Tokyo Car Rental Brochure



Belgrade Hotel Elevator



Outline before you write

Once you've identified the topics you need to cover and decided the best way to organize them, then you may want to prepare an *outline*. An outline is a preliminary table of contents that will serve as a road map as you write. It lists the sections of the document in the order you intend to present them.

For short documents, such as letters, memos, and emails, the outline may be only a few words. For slightly longer documents, such as short reports, proposals, and papers, it may also include subsections (two levels). For long documents, such as manuals and long reports, it may include sub-subsections as well (three levels). Match the level of the outline to the complexity and length of the document.

Outlining is a technique that many professional writers use. Not only will it guide your writing, but you can also review it with others interested in the document before you get started to make sure they agree with the topics you're planning to cover and how you're going to organize them.

For short documents, identify sections. For slightly longer documents, identify subsections as well. For long documents, consider outlining the sub-subsections.

Example of a document outline

Here's the outline for the first two modules of this workshop:

Module 1 Good Business Writing

- Over-the-top style
- Legal style (legalese)
- Bureaucratic style
- Abbreviated scientific style
- Say it in plain English
- Tone
- Styleguides and style sheets

Module 2 Plan to Write

- Decide your purpose
- Decide your objectives
- Understand your readers
- Reading at work
- Clustering
- Organize your ideas
- Organize your document
- Outline before you write



BAD WRITING CONTEST

We are searching for the worst examples of business and technical writing. Send in your favorite example of wordiness or doubletalk. A new contest starts with each newsletter. The prizes are:

First Prize: \$100 cash
Second Prize: \$50 cash
Third Prize: \$25 cash

As the number of submissions grows, the job of picking the worst examples becomes more difficult. We only wish we had room to print more.

Unfortunately, some of the worst submissions aren't submissions. We continue to receive them as part of our regular mail. This can lead to some embarrassing situations. For example, we received a sure winner in the form of an affidavit from a person working for a major city government. There was no cover letter, just a note with the person's name on it. So we assumed it was a bad writing contest entry and sent out our normal acknowledgement letter. It turns out the person wanted us to sign the affidavit and return it. Sorry about that.

THIS ISSUE'S WINNERS

FIRST PRIZE - \$100.00

First prize goes to Donald L. Redmond. This entry received extra points because Mr. Redmond admitted it was his own letter written early in his career. (Most people send letters written by their boss.) According to Mr. Redmond, he did not know how to answer the question and so wrote the following:

"Due to _____ Company's integrated organizational mobility we should, through our functional policy programming, be able to provide compatible third-generation hardware for increased loading. However, with our responsive management concept, we may desire other systemized monitored options or, possibly, balanced digital capability. In turn, it would then be necessary to utilize the total reciprocal flexibility which is essential to logistical compatibility."

SECOND PRIZE - \$50.00

Many entries come from user manuals and instruction books. Some of them are simply unintelligible. Others appear simple but are a little hard to follow. Take, for example, our second prize entry from Joseph Christie:

APPENDIX B: A WORD OF CAUTION

"The DOWN button, when depressed, will remain DOWN but will not stay UP unless the UP button has been pressed DOWN.

The UP button, on the other hand, will not remain DOWN and returns UP when pressed DOWN.

Should the UP button stick DOWN, pressing the DOWN button DOWN may possibly cause the UP button to release from DOWN and return UP.

If a situation exists in which both the UP and DOWN buttons are neither UP nor DOWN but the UP button is halfway DOWN and the DOWN button is halfway UP, then pressing the UP button will cause both the UP and DOWN buttons to come UP."

This appendix continues for several more paragraphs in the same vein. All instances of the words "up" and "down" throughout the appendix are capitalized, adding to the confusion. Personally, we would love to hear someone explaining this to a training seminar.

THIRD PRIZE - \$25.00

Resumes are another rich area for entries. We've been tempted to run a contest to find a resume which uses the word "use." Try it, you'll find it's always "utilize." Our third place entry from Barbara Stafford goes beyond the normal doubletalk and into the metaphysical:

OBJECTIVE: I desire a responsible, innovative position as an Electronic Engineering Technician in which my abilities are utilized fully and effectively; with opportunities for growth and space for life - to interject my visions when appropriate and when actualization is possible. Consequently, my desire for fascination can be endlessly fulfilled within any field; as long as temporal limitations are not placed upon it. I humbly feel my assets would be a worthy addition to your ardent firm.

Thanks again to our prize winners, and to all our entrants.

RULES:

1. All entries must be original, non-proprietary, and non-copyrighted. Entries become the property of RightSoft, Inc. RightSoft retains the right to use any entries in promotional and product literature.
2. Entries not received by the press date for a newsletter will automatically be entered into the contest for the next newsletter.
3. Entries will be judged on the basis of verbosity and likelihood of occurrence. All entries must have actually been used in real life.
4. Entries may be of any length from a single phrase to a multiple page document. We will print only excerpts from longer passages.
5. You may enter as many times as you wish.
6. No purchase is necessary to win.
7. Entries may not be obscene or vulgar.
8. Please include your entire name. We hate to refer to people by their initials. Tell us if you do not want your name published.