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ABSTRACT

This coursebook provides materials for a course to improve the writing skills of workers in health care settings. The course is designed to be presented in eight sessions over a 4-week period. Stated objectives for the participant are as follows: feel more comfortable with on-the-job writing, understand and use a process approach to writing, be able to choose from several outlining and planning methods, choose effective language for both reporting and persuasive writing, and revise memos and reports with a clear purpose and an intended audience in mind. Introductory materials include course goals, outline, and four suggested writing assignments. The first section covers the communication triangle, purpose, and audience. The second section addresses these topics: the writing process, writing behaviors/styles, planning strategies, drafting strategies, and revising and editing. Worksheets are provided in the first two sections for some topics. Two tip sheets discuss reviewing someone else's writing and strategies for quick writing. Seven readings for the participant are provided: "Writing on the Job"; "A Model of the Writing Process"; "Business Writing--without Blood, Sweat, and Tears"; "Memos"; "Clear Writing Means Clear Thinking Means..."; "Keep It Short"; and "You Are What You Write: Model Memos for All Occasions." The final section contains examples of hospital writing. (YLB)

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The Write Stuff: Memos and Short Reports

Tuesday and Thursday, 1:30-2:45
September 18 - October 11

Instructors:

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and Pierre Laroche

Department of English
NMSU

An offering of *Step Ahead*:

A Partnership for Improved
Health Care Communication
between
Memorial Medical Center
and
New Mexico State University

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The Write Stuff

Course Goals

At the end of this course, participants should:

- feel more comfortable with on-the-job writing
- understand and use a process approach to writing
- be able to choose from several outlining and planning methods
- choose effective language for both reporting and persuasive writing
- revise memos and reports with a clear purpose and an intended audience in mind

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The Write Stuff: Memos and Short Reports

Week One

Session 1 (9/18)

- 1. Introductions**
- 2. Goal setting**
- 3. Exploring the Communication Triangle**
- 4. Writing Assignment #1: The Policy Conflict**

Session 2 (9/20)

- 1. Defining good writing: purpose and audience**
- 2. Evaluate sample documents from hospital**
- 3. Connections between oral and written communication**
Finding the balance between formal and informal writing
Determining what is an appropriate tone and style
- 4. Writing Assignment #2: Requesting approval for tuition reimbursement for a course**
Reading Assignment: "Writing On the Job"

Week Two

Session 3 (9/25)

- 1. Overview of the writing process: planning/drafting/revising/editing**
- 2. Discussion of the weekend assignment**
- 3. Peer group revision of assignment #2**
- 4. Writing Assignment: Review and revise Writing #2.**
Reading Assignment: "A Model of the Writing Process"

Session 4 (9/27)

- 1. Prewriting: planning and organizing**
- 2. Planner/Drafters vs. Drafter/Rewriters**
- 3. Worksheet: A Plan for Writing**
- 4. Writing Assignment #3: Suggesting a Change in Procedure**
Reading Assignment: "Business Writing--without Blood, Sweat, and Tears"

Week Three

Session 5

1. Drafting strategies: brainstorming, treeing, outlining, jotlisting, nutshelling, freewriting
2. Peer revision of Assignment #3
3. Writing Assignment: Review and Revise Assignment #3
Reading Assignment: "Memos"

Session 6

1. Revising for purpose and audience
2. Editing sentences for clarity and emphasis
2. Writing Assignment #4: Performance Report
Reading Assignment: "Clear Writing Means Clear Thinking Means . . ."

Week Four

Session 7

1. Strategies for quick writing
2. Using the inverted pyramid
3. Using chronological order
4. Writing a quick report
5. Writing Assignment: Revise Writing Assignment #1
Reading Assignment: "Keep It Short"

Session 8

1. Quick review of course
2. Points to remember
3. Discussion and evaluation

Points to Remember

1.

2.

3.

4.

5.

6.

7.

8.

9.

10.

Writing Assignments

Assignment #1

Identify some problem in the way things are done in your work area: a problem that concerns policy. It might involve medical leave, promotions, performance appraisals, sick pay, dress and appearance, overtime, scheduling, or some other policy issue. In a memo to the appropriate MMC employee, describe the policy problem and recommend a better way to do things.

Assignment #2

Write a memo to the appropriate people requesting tuition assistance with a course you would like to take at NMSU or DABCC. The policy statement on tuition reimbursement is contained at the back of this coursebook.

Assignment #3

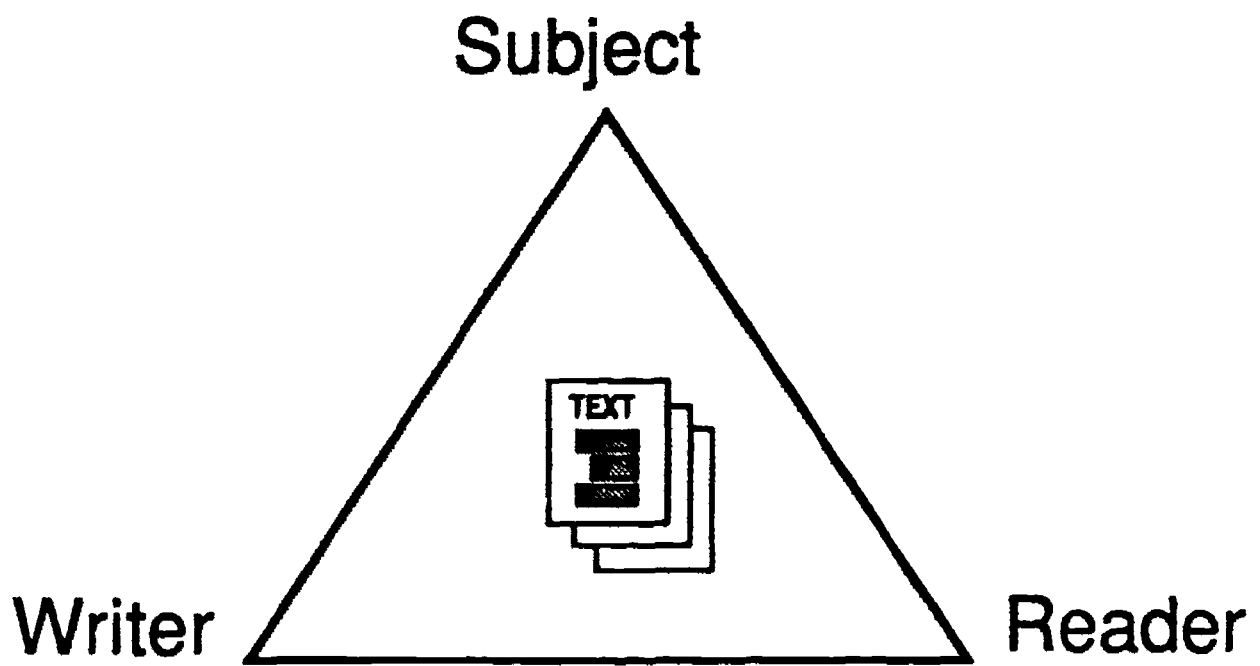
Identify an improvement in procedure within your work group. It shouldn't be a matter of policy, but something more immediate. Maybe you have an idea to improve handling of certain substances, or for directing patient inquiries, or for keeping records on incoming calls. In a memo to the appropriate person(s), suggest the improved way of doing things. Policy manuals are available in the classroom (and you might have one of your own).

Assignment #4

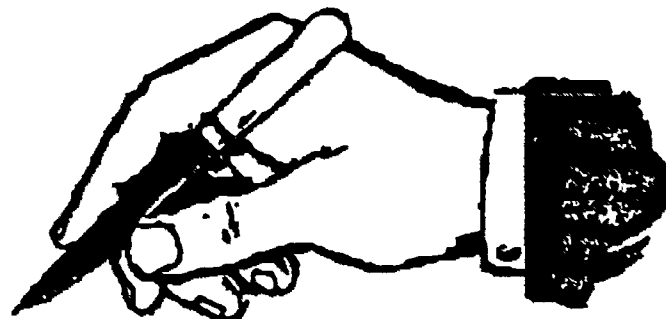
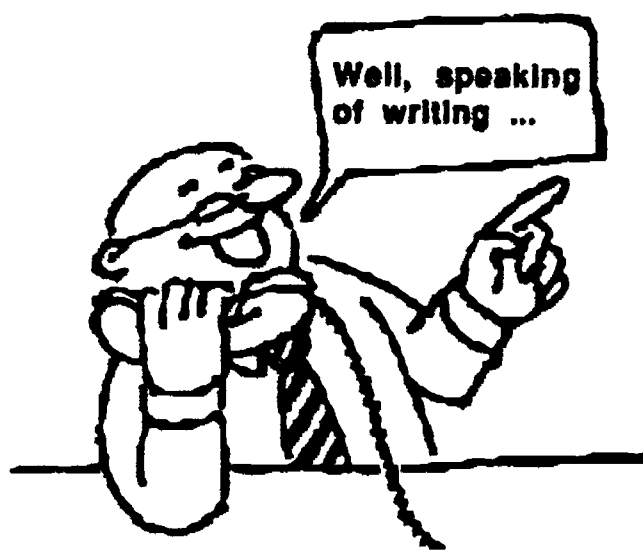
Do a self evaluation for the past year, addressed to your manager or immediate supervisor. Provide evidence of where you have done well in your job and areas you need to improve.

A sample of the general form used at MMC for yearly evaluations is included at the end of the course materials. This is to help you think about what sorts of categories MMC managers and supervisors use to rate their staff. You shouldn't try to cover each category or assign numerical ratings to yourself. Just highlight what you have done well, or where you have improved, or what new responsibilities you have undertaken. Think of your report as helping your supervisor to appraise your work.

The Communication Triangle



Speaking vs. Writing



Purpose and Audience Worksheet

Use these questions to get a clearer picture of your readers and your goals for writing.

Purpose:

- Why am I writing this?
- What do I want the reader to do?

Audience:

- Who is my reader?
- What does the reader know and how does the reader feel about this subject?
- How will the reader use this document?
- What is the reader's style? Should I adjust to it?

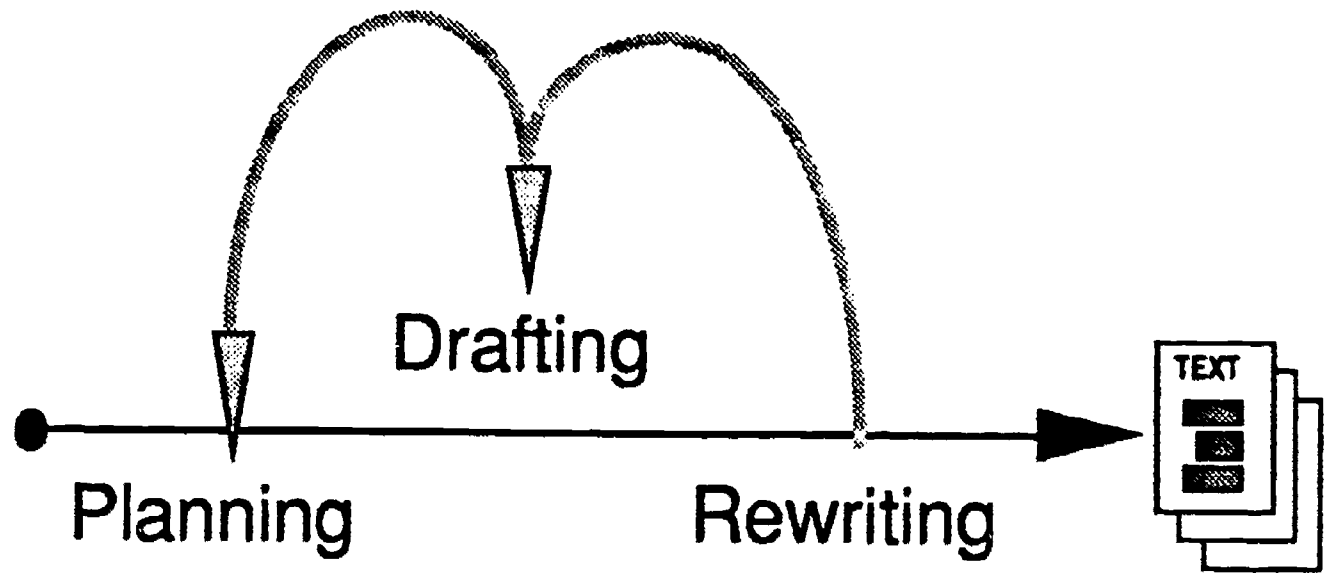
Cut to the chase:

- If the reader were to forget everything else, what one key point do I want remembered?

Strategy:

- Should I write this now or later? Should I write or call?
- Should I include deadlines and list any requested actions?
- Am I too late or is someone else communicating this same information?

The Writing Process



Planner/Drafters vs. Drafter/Revisers

Check off behaviors in each column that describe your typical writing behaviors.

Planner/Drafters

- I tend to make outlines, flowcharts, or diagrams
- I think for a long time before I start writing.
- I like to analyze my audience: who they are, what they want, what they need to do.
- Once I start writing, it comes out pretty much in final form.
- The only revising I tend to do is correcting spelling and grammar.
- It seems to take forever to decide what to write.
- I spend a long time trying to get started—I often procrastinate.

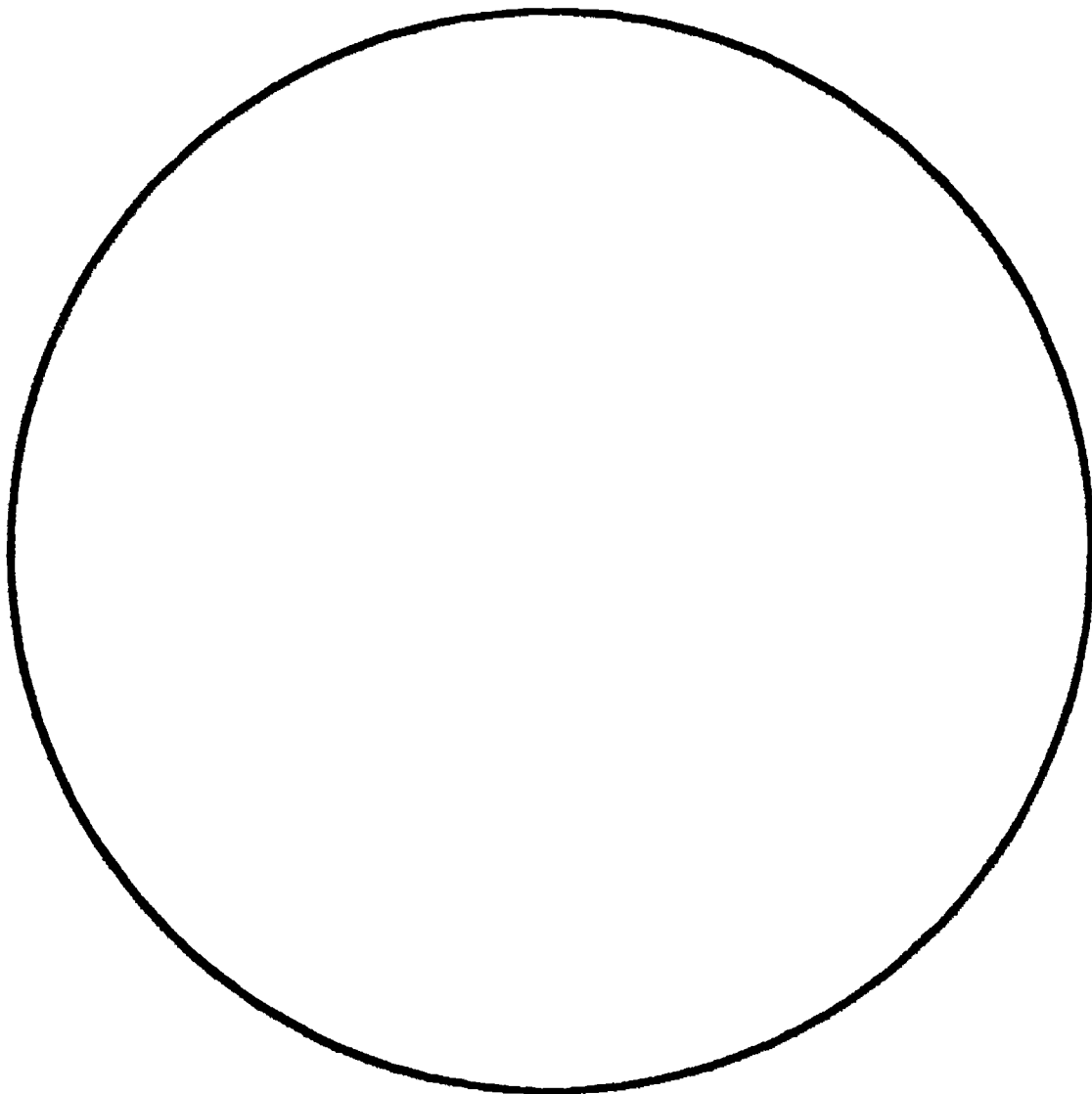
Drafter/Rewriters

- I like to just start writing.
- I usually throw away several starts before I am happy.
- How can I know what I mean until I see what I say?
- I tend to do major revisions: moving whole sections around, deleting large parts, changing my focus or purpose.
- I can't seem to stop fiddling--making changes, scratching out sentences, adding information.
- I tend to lose my train of thought because I keep editing sentences.
- My desk ends up with a huge messy pile of paper and scraps.

How Do I Spend My Writing Time?

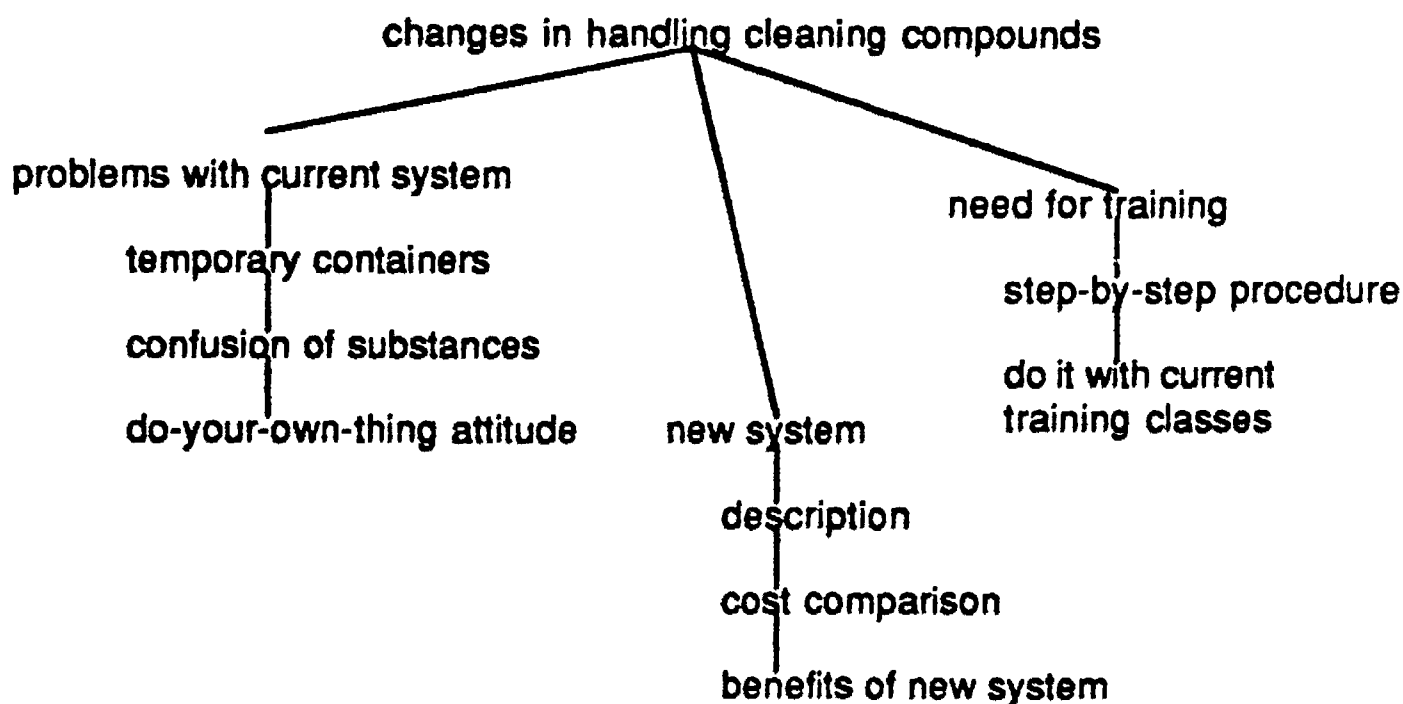
Draw a pie-chart to show how you spend your time when you need to write something. You might include time you spend:

- **planning:** analyzing the situation and gathering information
- **organizing:** developing outlines or strategies
- **procrastinating:** cleaning your desk, getting coffee, doing other stuff
- **drafting:** writing rough first drafts
- **rereading, or reading out loud**
- **revising:** reworking and improving the drafts
- **editing:** correcting grammar, spelling, punctuation

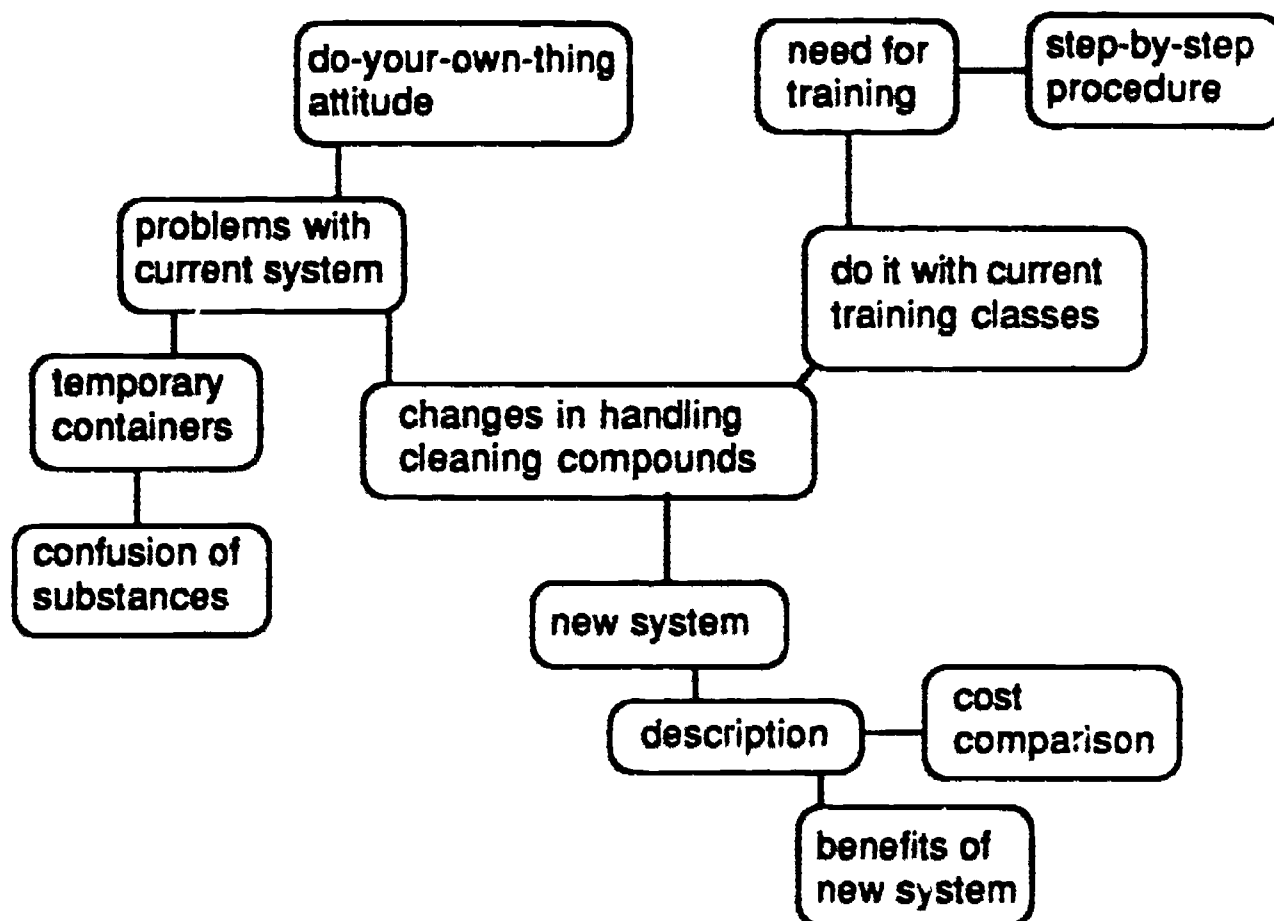


Some Planning Strategies

1. **Brainstorm your topic:** List as many possible ideas, approaches, examples, strategies as you can. Don't censor yourself--let it flow uninterrupted. Then sort and find the good stuff.
2. **Identify Keywords:** Try to identify a single word--a cue or a rich bit--that really captures your problem, your topic, or your task. Or write the headline for your piece of writing.
3. **Imagine different readers' responses:** What would my boss say about this? What would my husband say? What would Sally in the Emergency Room think about this?
4. **Nutshell your topic:** Describe in a sentence or two the purpose and audience of your memo or report. Try to think in terms of *action*--what it is you want to happen. When you state the purpose, state both your purpose and your reader's purpose.
5. **Establish operators:** Don't just state your purpose, but state how you can achieve it. Instead of simply thinking--"I want some help with tuition so I can take some courses"--think *goal plus operators*: "I will use the procedures in the policy manual to apply for tuition reimbursement to the personnel manager so that I can afford to take courses in radiation technology at DABCC. The courses will be approved because MMC is likely to need more radiation technologists."
6. **Tree your topic:** Draw an upside-down tree structure that shows what you intend to say or demonstrate.



7. **Cluster your topic:**



8. **Use creative thinking strategies:**

Use metaphor or simile: "Getting physicians to sign the orders is like..."

Use another language: How would an accountant describe the situation? Or how would an engineer look at this? Or what would an elderly patient say?

Examine your subject from different perspectives: How has it changed over time? What is it like? What would it have to have to be something else? What system is it a part of?

9. **Talk about your situation:** Often, just talking about your writing will suggest an approach.

10. **Let your topic simmer on the backburner:** If you can't decide how on a plan for writing, go on to some other activity. Your mind is perfectly capable of working on a problem in the background.

11. When all else fails, mumble to yourself and stare out the window.

Drafting Strategies

1. You might start by putting your outline on paper or on a computer screen with space left between the entries proportional to the amount of text you think each entry will require. Then try grafting your text onto the outline. The outline provides the skeleton for fleshing out your text; so when you get blocked in one section, the outline can serve as a reminder of other sections to work on .
2. For shorter documents, try to get your whole draft done in one sitting, as quickly as you can. For longer documents, see if you can complete a whole section at one sitting. Remind yourself that you're not after perfection, but a quick first draft.
3. Start writing the part that you feel you know the best. There's no obligation to start at the beginning; in fact, the introduction is often the *last* thing you should write. After all, how do you know what you're going to say until you've said it?
4. If you are writing in one section and get an inspiration for another section, quickly jump to that section, write yourself a brief note (I surround mine with square brackets so I can easily search for them later), and then jump back to where you left off.
5. Force yourself to keep going forward, not backward. This is hard, but if you can kick that editing demon off your shoulder while you draft, you may be able to keep up with the composing voice that dictates what to write. (It tends to shut up when the editing demon takes over.) You'll be surprised by how much you have to say about your topic.
6. When you get blocked (and we all do sometimes), try jumping to another section and begin drafting there. (Remember those bracketed notes you left for yourself?) If that doesn't help, go back to the top of your document and read down through what you've already written. That often gets the creative juices flowing again.
7. If you're still blocked, you might seek out a colleague and tell him or her what you're trying write. You will often talk through the block, and find yourself saying *exactly* what you want to write. It's often a good idea to bring a tape recorder to these sessions to capture your words.
8. If you are still blocked, put the project aside and work on something else. Your mind is perfectly capable of working on the back burner to solve a problem while working on another project at a conscious level. Ideas for the blocked project will come as it simmers on the back burner of your mind.

Revising and Editing Checklist

Revising

- Is my purpose clearly stated?
- Is the tone right for my intended audience?
- Have I included the right amount of detail for the level of understanding I want my audience to have?
- Is the most important point at the top of the document, or is it strategically placed?
- Do I request any specific action?
- Is the overall document organized logically?
- Does the text flow smoothly from section to section?
- Is the text visually appealing? Is it inviting, or does it look forbidding?
- Do I make good use of figures and tables to support my main points?

Editing

- Have I written complete sentences (not fragments or run-ons)?
- Do my subjects and verbs agree?
- Am I using active voice? Do I make it clear *who* is doing *what* to *whom*?
- Am I consistent in the use of tense, number, person?
- Have I used correct spelling and punctuation?

Reviewing The Writing of Others

Being able to review someone else's writing is one of the most important skills a writer can develop. One of the quickest ways to learn about writing is to help others, because that forces us to be readers and writers at the same time. You can use these strategies on your own writing, too. Just change hats as you talk to yourself.

Read:

- Read the document once straight through. Don't mark up the writing, just read as if you were a real reader. Stay in touch with how you feel, where you get confused, where you stumble on sentences.
- Read it a second time, this time making notes or checking areas you think need more work.
- Read it out loud if you really want to hear how it sounds.

Check the revision worksheet:

- Is the purpose clear?
- Does the writer establish connections with the audience?
- Are there enough details?
- Is the document focused and visually attractive?

Feedback:

- Praise two or three specific areas of the document. Don't say, "this is nice." Go the distance: "This paragraph told me exactly what I needed to know at this point," or "This sentence tells me exactly what I ought to do."
- Use positive language. For example, refer to sections that still need revision as areas to improve, not as problems.
- Try to phrase comments with "I" statements and avoid "you" statements. "I needed more evidence here," instead of, "You really lost me on this one."
- Ask the writer to paraphrase or restate unclear passages. Use questions like "Could this section be stated in another way?"

- **Be kind and use your imagination. Remember, you're on the writer's side. Your behavior will convince her of that.**

Make sure the writer leaves with a sense of purpose:

- **Recap the positive and restate the areas that need improvement.**
- **Allow the writer plenty of time to ask questions and clear up any confusion.**
- **If it is appropriate, both writer and critic should set a deadline for the next round of revisions.**

When the shoe is on the other foot:

- **Don't be defensive, listen to the feedback.**
- **Don't start explaining: "What I meant to say was" or "The reason I did it that way was" Don't bother arguing. Just say "Thanks," or "OK, I understand."**
- **Ask all the questions you can about the document. It is not unusual to discover solutions to writing problems by talking about them.**

Quick Writing Tips

Sometimes you have to complete a piece of writing immediately. When speed is the problem, organization is the solution. On this page you will find three outlining methods that can help you write under pressure.

The Inverted Pyramid

This journalistic method works for many people. The trick is to list what needs to be communicated and then order it according to importance. Informed readers can then scan the document from top to bottom for the information they don't already have, while less informed readers can read the entire document.

- List the information you must cover from most important to least important. Eliminate all unnecessary information.
- Start writing the most important information and work your way down the list
- Keep your paragraphs and sentences short and snappy.
- Insert headings where needed.
- Proofread.

The Question Outline

People who do quick research often rely on this method to shape their notes into simple reports. All you have to do is write a paragraph or two in answer to each question. But be careful, since this doesn't work for every piece of writing you do. In the right situation, it can cut writing time considerably.

- Write the answers to the questions that apply to your task: Who? What? When? How? Why? So What?
- Shuffle the paragraphs into whatever order you feel makes the most sense.
- Add any necessary transition sentences.
- Keep your paragraphs and sentences short and snappy.
- Insert headings where needed.
- Proofread.

Three stage outline

This is one of the easiest ways to avoid the chronological or "then-this-happened-and-then-this-happened-and-then-that-happened" trap. It is sometimes tempting to communicate the entire history of an incident and neglect to organize the information to help your reader. This method can help you avoid that habit.

- **Start the document by stating the problem. Label the section, "Problem" or "Problem Description."**
- **Spend a paragraph or two catching the reader up on background information. Label the section "Background."**
- **Suggest a solution or notify the reader of the action you have already taken. Label the section "Recommended Action" or "Action Taken."**
- **Keep your paragraphs and sentences short and snappy.**
- **Insert headings where needed.**
- **Proofread.**

Writing on the Job

The Place of Writing in Business

Writing is important to business. Estimates of the time people spend writing in a normal workday run upwards of 25%. Yet some researchers believe this may even be a low estimate, since people typically don't consider time spent planning their writing to be actual writing time. If we count both the time spent writing and the time spent reading what others have written, the figure is closer to 40%. That is a lot of time and it represents a significant business expense.

Poor writing is bad business. It slows down the communication process, causes confusion, and encourages mistakes. Most businesses are inundated with paperwork. There is just too much paper around—reports are too long, memos too frequent, correspondence too burdensome. When the writing is not only lengthy but bad—filled with mistakes, poorly organized, unclear—writing becomes a hindrance rather than a tool for doing business.

But good writing is *more* than just a tool for doing business; it is itself a business product. In the widely heralded information economy, written information (whether in hard copy or electronic form) is often the commodity that is being traded. Product documentation, feasibility studies, product brochures, test reports—these all represent business products just as much as manufactured goods did. Companies have huge sums wrapped up in their information products.

Individual Writing in Business Settings

Good writing is also important at the individual level. The memos and reports that employees write serve the interests of the company, but they also serve as a primary means of individual evaluation. It may never be stated outright that you will be evaluated on your written reports or memos, but all too frequently, nobody knows what you did until you put it in writing. The impressions formed of you as a worker, especially by higher-ups who are not in your immediate work setting, are often based on what you write.

Thus writing serves as a key means of job evaluation and plays a large role in decisions concerning promotions and merit raises. Writing serves to establish and maintain an employee's role within a company. And the higher one moves within an organization, the more important and time-consuming writing becomes (at least until one reaches the levels of upper management, when oral communication becomes more important than written). Supervisors write more than line employees; managers write more than supervisors.

Yet the importance of writing is often not acknowledged. Researchers who look at the workplace find that many employees feel uncomfortable with their writing. Most employees feel they spend too much time writing, that their writing is weak in one of a dozen ways, that they really need to brush up on the principles of good writing. Employers will complain that they see weaknesses in the writing of others, perhaps lamenting that colleges don't do a better job of training students in essential communication skills. They will also admit that their own writing could be improved.

Many employees do not define themselves as writers or define writing as their work. They say they are test engineers, or biologists, or sales representatives, or accountants; yet these workers spend much of their time writing and many of their work activities are directly aimed at producing some written product. Many employees attempt to keep writing in a subordinate position, as something they have to do but would rather not. They see writing as a necessary evil associated with their jobs. Writing is a foe, not a friendly tool, a tool closely related to success within the organization.

The Need for Writing Training

It is ironic that the importance of good writing is not more directly confronted in business settings. We acknowledge the need for training in new methods of accounting, or in management by objectives, or in using new data processing tools, or in handling new machinery, yet companies don't often recognize the need for training in writing. Perhaps this situation is changing—a recent survey of top business executives noted that the improvement of writing skills was the number one priority for workforce training (National Public Radio, Nightly Business Report, December 19, 1989).

Writing is complicated business. Writers need a special language to work with, special techniques for editing others' written language, and special concepts for understanding what makes writing clear, forceful, and effective. Instead of working to gain these specialized competencies, many

employees assume they can simply pick up what they need to know as they use the language.

This course attempts to bring the importance of writing to the surface--to talk explicitly about good writing. As an employee, you need to know what counts as good writing, how writers think and work, and how readers respond to your writing. You need to recognize and control grammatical trouble spots and to have a language for doing so. And you need a few terms and some special skills to describe how sentences work, so you can control language and use it effectively.

The Importance of Purpose and Audience

The real key to good writing is a well-developed sense of purpose and audience. Good writing will follow once a writer decides exactly what needs to be accomplished and who can accomplish the task. And often, a clear sense of purpose and audience will prevent problems of grammar and word choice at the sentence level.

The worst kind of writing is that which has no clearly defined purpose or targeted audience. You might read a memo and wonder: "Am I supposed to do something? What is this writer's point? Why am I being told these things?" And often, this kind of writing may have annoying errors or variation in word choice that indicate the writer's uncertainty (or even lack of thought) about purpose and audience.

When you shape a piece of writing around a clearly defined purpose and audience, you give yourself a tool for deciding what to include and what to delete, what to emphasize and what to downplay, and how to order your arguments and evidence. A sharply defined sense of purpose and audience will also guide you toward an appropriate strategy and tone. With a clearly defined purpose and audience, you can begin writing to specific individuals with a clear sense of what you would like them to do. You then have a yardstick for editing and revising that lets you measure how well you are communicating your purpose to your audiences.

Multiple Purposes, Multiple Audiences

Most work environments are complicated places, and purposes for writing reflect these complications. A writer will have an obvious purpose for writing, but behind the stated purpose may lie hidden motives of personal advancement, empire building, or efforts to change or influence the organization.

For example, suppose I am a supervisor who has a problem with employees using the office photocopier for personal business. If I decide a memo is the best way to handle the situation, this gives me an obvious purpose for writing.

But behind the obvious purpose of stopping unauthorized uses of the machine are other, secondary purposes that make the memo a complicated business. I do not wish to alienate those who haven't used the machine for unauthorized uses. Nor do I wish to make a contest of the problem, challenging people to use the machine without being caught. And I certainly don't want my employees to get the idea that the office will be patrolled by a photocopy police squad. I would like simple cooperation from my employees; I want them to recognize the reasonable nature of my request to stop using the machine for unauthorized copying.

Most writing situations are like this—complicated, multi-faceted, somewhat touchy in their interpersonal complications.

Nor is it a simple matter to define an audience. My memo is directly addressed to those in my office with access to the photocopy machine. Yet there may be other, secondary audiences who see my memo. Perhaps my manager will review my files to evaluate my work. Perhaps I will end up having to discipline an employee who continues to use the photocopier for personal use, so my memo becomes a legal document used as evidence in the proceedings against the employee. Suddenly, new purposes and audiences open up for my "simple" memo. The words I wrote for my initial purpose may suddenly prove inadequate to the new demands on them.

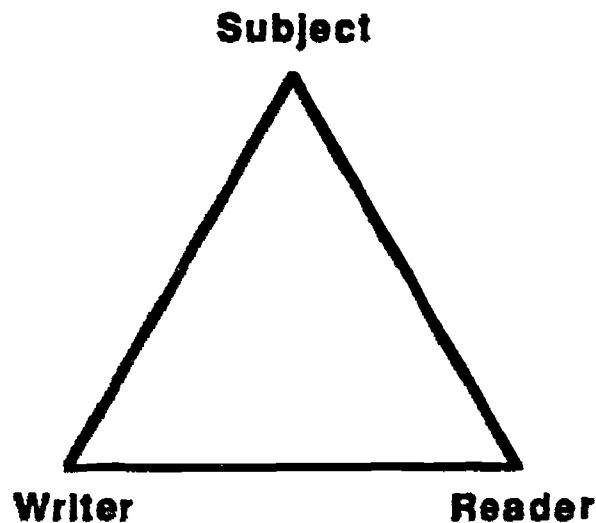
You often cannot predict where a memo will end up, into whose hands it will fall in addition to those named specifically at the top. Every time you decide to copy a memo up or down the organizational hierarchy, you risk appearing to go over someone's head or appearing to be insensitive to office politics. Often, the tone and approach that is right for the primary audience—perhaps a close supervisor—is totally wrong for the secondary audience—perhaps a manager up the line.

Writing has a permanence that speaking lacks. Once you commit an idea to a paper, it has a life of its own. It ends up in files where you don't expect it and shows up at the wrong time. Before you write, your first step must be to decide whether to write at all—whether your purpose might not be better realized by telephone or face-to-face communication.

A Communication Model of Writing

Many writers find visualizing the communication situation as a triangle to be helpful in conceptualizing writing tasks:

The Communication Triangle



In this visual representation, the message—what is actually being communicated—is surrounded by those features that shape the message. At one corner is the writer, the one who usually has some purpose for sending a message. The writer sends the message to some reader or audience—represented at a second corner—who has some reason for reading the message. Finally, in the third corner there is the topic: what the message is about. So the writer, the audience, and the topic are closely related, like three corners of the same triangle.

There is more to this representation, however. Note that the writer and reader are connected by one side of the triangle. They don't exist in isolation, but are directly tied in some relationship, represented by the connecting side. Every time you write, you establish such a relationship between yourself and your audience. You assume, as a writer, a role of either asking or telling someone to do something, of either cajoling someone into cooperation or threatening someone with undesirable consequences. In other words, you don't simply send messages about the world when you write—you impose a relationship on the receiver of the message. It is in this touchy business of imposing relationships that writers often fail, for their sense of appropriate relations is often at odds with their reader's sense.

The other sides of the triangle represent the writer's understanding of the topic and the reader's understanding of the topic, two understandings which are rarely equal. Sometimes writers get so close to their subjects, they have such thorough understandings, that they begin to have trouble imagining what their readers don't understand. They begin using jargon or acronyms (abbreviations by first letters, as in UNIX or ASU) and insider language that their readers have trouble understanding.

The relation between the reader and the topic is especially tricky because it involves not only the reader's actual understanding of and attitude towards the topic, but also the writer's estimate of that understanding and attitude. You know the feeling of reading something where the writer seems to know much more than you do. And as a reader, you may sometimes be alienated by writers who patronize you by assuming that you know less than you really do.

Surrounding the whole triangle is the very messy, complicated world that influences the written text. Deadlines, budgets, outside issues that compete for our attention--all influence the shaping of the message. How messages are produced and delivered, what the reader's frame of mind is, whether a reader actually reads the message--everything in the situation that surrounds a message helps determine its success.

The communication triangle can remind you of the complexity of most writing situations, with its key elements at each corner and the connections between these elements. Writing often feels like a balancing act, trying to achieve an appropriate balance between appearing too bossy or too undecided; between writing as an expert or writing to be fully understood (even by novices); between relying on what readers know and deciding what they need to be told. The triangle, with its geometry of perfect balance, offers you a metaphor of good writing.

Becoming a Good Writer

No book can teach you how to analyze your particular writing situations. To be a good writer--one who responds to the situational demands of particular purposes and audiences--you need all your analytical skills.

You need to be firmly in control of your work situation, understanding what needs to be accomplished and what are efficient strategies for attaining your purposes. You need to be a psychologist, understanding what motivates people and what alienates them. You need to be a manager, responsive to how duties and roles are assigned within your organization. And you need to be a politician, one who understands how to get competing groups to work harmoniously.

To be a good writer, you also need confidence. You need to trust your insight, to believe you have good ideas worth conveying. If you are insecure about the quality of your ideas, anxious about your authority, hesitant about your ability to solve problems through writing, you'll produce writing that is obscure, riddled with jargon, impenetrable, and confusing. Many insecure workers try to hide behind their writing, throwing up smokescreens that obscure and confuse.

Confident workers are confident writers—they articulate problems clearly and offer solutions which will stand on their own merits. Good writers take responsibility, confident they have ideas others will respect and respond to. Good writers recognize that most business situations are already complicated and don't need language which further complicates matters. Good writers appreciate prose that is lean and efficient, that works hard and gets the job done without a lot of wasted words.

The problems of the vague, stuffy, bureaucratic style that are covered in this text tend to show up in the writing of employees who are new to the organization, who are insecure with their positions, or who are uncomfortable with their own authority. The principles we recommend for a vigorous, direct, active style will only feel comfortable if you are confident of the quality of your work and secure in your position within your organization. In some ways, style is the man (or woman) and only a strong, confident worker can project a strong, confident style.

A Model of the Writing Process

Many people think that good writers sit down at a typewriter or word processor and let a document flow letter-perfect onto the page or screen. They themselves can't do this, but they believe that if they were truly good writers they would be able to do so.

In fact, good writing involves a great deal of planning up front before you begin to write, as well as rewriting after you finish a draft. The best writers are those who allot time before and after drafting to include these vitally important activities.

We speak of the writing process as having three stages: planning (or prewriting), drafting (or composing), and rewriting (revising and editing):

The Writing Process



All of these stages are necessary to the process of producing a successful document. Depending on the importance of the document, the amount of time you have to produce it, and your writing experience, you may shortcut some of the activities in each stage. Nevertheless, when you're involved in any of them, you are truly engaged in writing.

The Planning Stage

MAPping a Document

It is important to have a clearly defined purpose for writing and to adapt your writing to a specific audience. But purpose and audience are only two of the things you need to think about in the planning stage, before you begin to write. You also need to think about the *type* of document you are going to produce—what it typically looks like and how it is typically organized. An internal memo is formatted and organized differently from a piece of external correspondence. You need to think about the medium in which the document will be produced—handwritten, typed, printed in dot matrix or sent through electronic mail. Each of these has a different look and a different impact on the reader. You need to think about what your likely sources of *information* are and how much *time* you have. Time constraints often shape all stages of the planning and writing process.

Finally, you need to think about the situation in which you are writing—not just your immediate reason for writing, but the larger political and social situation. What has happened that calls for you to communicate at all? Why have you chosen to do so in writing? Where will your readers be when they read your document and what will they be doing with it?

Purpose, audience, type of document, medium of production, sources of information, available time, and situation are all things you need to think about in the planning stage. We group these together under an acronym to help you remember the first part of the planning stage. The acronym is MAPS (for medium, audience, purpose, and situation).

To help you with MAPping a document, we have included a Purpose and Audience Worksheet in the course materials. You might photocopy it and use it each time you begin a new document. Or you might adapt it by changing and adding questions that are more tailored to your work situation. Some of the questions are probably not new to you if you are an experienced writer on the job, but you may not have considered them consciously before.

Creating an Outline

Once you've given some thought to these considerations, you need to continue planning by gathering your information and creating a rough outline. Your outline needn't be formal—you can just jot down the main

points you want to make and then, indented beneath each point, sketch a few sub-points or supporting pieces of evidence. Many people find it helpful to create diagrams that show the major points and their connections. Others like upside-down tree structures that show the hierarchy of the document. All the outline really needs to show is the order of points you're going to make, with some indication of what points are more important than others.

All of these planning activities take time. One thing we know from research is that good writers will take up to *half* of their total writing time in planning. Again, the amount of time you spend on these planning activities will depend on the importance and length of your document. It may also depend on whether you've written anything like this before, in which case you'll probably finish your planning faster.

Once you've thought about audience and purpose, gathered your information, and sketched out an outline, you're ready to begin drafting. But before you begin, notice the approach taken here. We're suggesting that you shape your document from the *outside in* (some writers call it *top down*). We're not suggesting you start with sentences on a page and try to build up a successful document word by word and sentence by sentence; instead you're beginning with external considerations, and letting your decisions there dictate the shape of the document you ultimately produce.

The Drafting Stage

Many people think that good writers write it right the first time, without having to go back and change anything. But while good writers may get it *pretty good* the first time (and experience helps here, especially previous experience in the type of document you happen to be writing), nobody gets it perfect the first time.

In fact, good writers typically go back and make lots of changes in their documents. But what good writers know is a technique that lets them get a first draft done very quickly. We'll share it with you here: *Good writers separate drafting from rewriting*. That means they don't try to get it perfect the first time; instead, they try to get their material down on the page or screen *before* they worry about cleaning it up.

This simple technique can save you a lot of time, because it allows you to postpone editing and criticizing your writing until you get some ideas roughed out on the page or screen.

There's a good analogy here to building a house. After you lay the foundation for a house--which is essentially what you do in the planning

stage of writing—you don't frame one panel of the house, install your wiring and plumbing in the panel, frame in a window, insulate the panel, sheetrock and wallpaper the inside, brick the outside, and then stand back and admire the beginnings of your house. For one thing, you'd be lucky to have all the seams and corners match in the final product. For another, it would be unbelievably expensive to keep calling in your various subcontractors to finish off one panel at a time: they'd all be there every day!

And yet, many people try to draft in just such an inefficient way. They work on one paragraph or section at a time, polishing off that section until they are satisfied enough to go on to the next section. No wonder such writing is so agonizing for its writers, and so choppy to its readers. And on top of being agonizing, such a method of writing is wasteful, because the one paragraph that you spend a long time polishing may end up in the scrap heap when you decide to rewrite.

Getting words on paper or screen will help you feel a sense of accomplishment, which in turn will motivate you to keep working on the document. Seeing words allows you to use your visual intelligence to organize what you have to say and fine tune your writing for your purpose and audience. Getting words down, even if the ideas are poorly organized, can help you think in ways that are just not possible when the ideas are simply milling about inside your head

The Rewriting Stage

Once you have drafted your text, you are ready to begin rewriting for effectiveness. We'll distinguish between two activities within rewriting:

- 1) **revising** for large concerns like appropriateness for your audience, clarity of purpose, and overall organization; and
- 2) **editing--rewriting** to make your sentences and your word choice correct and effective.

So you'll want to first consider how well your document fits with your overall goals:

- Is my purpose clear?
- Is the tone right for my intended audience?
- Have I included the right amount of detail for the level of understanding I want my audience to have?
- Is the overall document organized logically?
- Does the text flow smoothly from section to section?

- Is the text visually appealing? Is it inviting, or does it look forbidding
- Do I make good use of figures and tables to support my main points?

These questions are the domain of revising. It is a mental challenge to look at the whole document and make large-level decisions about whether it works. But you need to see the big picture before you start the nitty-gritty work of editing--or you'll end up with well-constructed sentences and paragraphs that don't add up to anything for your audience.

When you edit your writing, you need to take a really close look at what you have on the page (and not just what you think *think* you have on the page):

- Have you written complete sentences (not fragments or run-ons)?
- Do your subjects and verbs agree?
- Are you consistent in tense, number, person?
- Have you used correct spelling and punctuation?

One critical piece of advice in rewriting is to *sweat the small stuff last*. By *small stuff*, we mean spelling, punctuation, grammar, and phrasing--all those things that immediately jump out from the page at you when you re-read something you've written.

Sweating the small stuff last means that you should *revise before you edit*. Why is that good advice, when it seems easier to edit the small stuff first? Well, for the same reason that we encouraged you to draft the whole document or section completely before you start rewriting any particular section: Otherwise, you may later find yourself deleting a highly edited, brilliantly written paragraph because it doesn't fit the tone of rest of the document.

Of course, separating revising from editing means that you have to make multiple "passes" through a document when you're rewriting. And that makes sense, because it's difficult to read for both revising and editing concerns at the same time. It takes a lot of concentration to evaluate the logic and organization of a document, so you need to keep reminding yourself of your focus of concern. It's easy to get distracted by details.

Two Styles of Writing Process

Our discussion of the writing process would be complete at this point if all good writers followed the process the same way. But they don't. So we'll conclude with a discussion of two different styles of writing process, each with its own strengths and corresponding weaknesses. It's important for you to know about this difference, not only in validating your *own* process of writing, but also in understanding those writers around you who have a *different* process.

When researchers first began to study the writing processes of writers on the job, they expected to find that all good writers would follow the same process, devoting the same proportion of time to the same stage of the process. The researchers expected that good writers would all spend about half their writing time in planning, about a fifth in drafting and the remaining third in rewriting.

But when they actually studied the process of good writers on the job, researchers found that writers tended to fall into one of two groups. In the first group were writers who spent a great deal of time planning—even to the point of drafting individual sentences in their minds before they began to write—and then poured out their text in almost final form. These writers—whom we'll call *planner-drafters*—did very little rewriting, because they had already done a good deal of it mentally.

The other group were writers who began to write almost immediately upon receiving an assignment. These writers spent almost no time planning, but instead did a lot of their planning work in the process of refining their message through numerous drafts. We'll call these writers *drafter-rewriters*.

In the following sections we'll look at the strengths and weaknesses of each type. In some ways the strengths and weaknesses of the two types are complementary: the strengths of the planner-drafter turn out to be the weaknesses of the drafter-rewriter, and vice versa.

Planner-Drafter

The planner-drafter's strategy works especially well when he or she is in a hurry, or when the time and patience of information sources are limited. The planner-drafter appreciates the way that advance planning can save time. By doing the planning all at once up front—rather than piecemeal in the drafting and rewriting stages—the planner-drafter is saved from the need to produce an infinite number of rewrites of a document.

However, the planner-drafter has little appreciation for the way that encoding ideas into words can change the shape of ideas, and may look at the drafting stage as a merely mechanical process of "pouring out" the contents of the document onto a page or screen. You're likely to have heard planner-drafters say things like: "I've almost finished that report; all I have to do now is write it." But the planner-drafter may get blocked in drafting when what he or she planned to say just doesn't turn out as expected.

Drafter-Rewriter

The drafter-rewriter, on the other hand, appreciates the way that numerous rewrites can shape and prune a draft. He or she is familiar (and comfortable) with the experience of words not matching ideas, so it is no problem for this writer to put half-formed thoughts and disorganized ideas on paper. The drafter-rewriter also knows that quick drafting is a wonderful tool for discovering new connections and dimensions of ideas as they are put into words.

In contrast to the planner-drafter, the drafter-rewriter has too little appreciation for the way that planning up front can save time and aggravation. The simple truth is that work situations often do not allow a writer the luxury of more than one or two rewrites, so a draft-rewrite strategy with its insistence on multiple rewrites may cause consternation at work.

Writing Styles in a Group Situation

You may recognize not only yourself, but also colleagues from work in these portraits. You may be a planner-drafter supervising a team of drafter-rewriters. When you see hard copy coming off the printer, you think they're close to completion--when in fact they've only begun. And so you begin criticizing details that are really rewriting concerns, not drafting concerns.

Conversely, you may be a drafter-rewriter leader for a team of writers who are all planner-drafters. You are understandably nervous when, three weeks into a six-week project, your team assures you that they are making progress when they haven't yet produced a first draft--coherent or otherwise.

Good writing--following *either* style of writing process--is always hard work, but with practice you can learn to control your writing process and

to balance your preferred style with the strengths of the other process style. Knowing how you work best and experimenting with new approaches can give you a sense of control over your work. This control, in turn, can make writing seem like less of a huge, unmanageable chore and more like what it should be—a productive, rewarding part of your career.

Business Writing-

without **Blood,** **Sweat and Tears**

Two communications experts reveal a fool-proof way to master the memo—and knock out writer's block once and for all.

by Judith Yellen and Barrett J. Mandel

If you hate to write, you're not alone. Although you may have heard that hardly anyone writes well anymore, in our work as communications consultants we seldom come upon managers who can't write an acceptable business document. But many share stories of headaches, frustration and stress generated by the time it takes them to write it. They tell us of their "dyslexia," fear of failing, lack of talent, and writer's block. In almost all cases, the real source of the problem is that they simply haven't realized what most successful writers know: Writing is a multiphase process, and each phase involves different activities and varying amounts of time.

How do you go about completing a writing assignment? This is a question we ask of all our clients. We have them draw a pie chart to make them conscious of how they allot their writing time. You may want to try this too: Draw a circle and, moving clockwise, divide it into segments representing how much time you devote to each phase of writing after you've completed your research. Include the time, if any, that goes into procrastination or overcoming writer's block.

Over the years, we've looked at hundreds of business people's time-management charts and have boiled them down to three mod-

els: time managed by anxiety, time managed by misconception about writing, and time managed effectively.

Time managed by anxiety

A senior systems manager at a large insurance company suffers from writer's block. Soon after she sits down to write a business document, she develops physical symptoms of stress. She devotes the largest portion of her planned writing time to telephoning friends, visiting the rest room and coffee maker, staring out her office window and worrying about the time she is wasting. She feels like she is at the mercy of some invisible force over which she has no control. Eventually, though, her mental logjam dissipates and she

PREWRITING VERSION

To demonstrate our writing process, we asked a professional business writer to keep copies of her work as she produced a sales-promotion letter. Her first, handwritten notes to herself are written freely and quickly to relieve the discomfort she feels when she begins an unfamiliar assignment. She was intent on putting down on paper as many ideas as she could.

LP!!

Pick up dry cleaning
call Marney

No telephone tag, better communication
they know LEXIS

- This is hard to explain, you've got to see it

- So many features

Let us demonstrate this software for you

It's got lots of features

Here's some you'll use now

BENEFITS: No special equipment. PCs + modems

*** Communication**

I Outside Firm:

0. Several parties to a proceeding
(Give disks per project basis)

- USE FOR → joint briefs
- outline for Agenda (joint)
- info. updates, esp last min.
- "registered mail"

2. Major Clients:

- Easy access to Attorneys
- (NO telephone tag!)
- Info/idea/Agenda exchanges

II W/IN FIRM: contact w/branch + European offices

~~VS. FAX~~ - more informal (ideas, ques.)

Message ARRIVES

on Computer

NO INPUT!

Convenient
It's on yr. desk

Dear Mr. **MAKE STRONGER MORE ACTIVE WORDS YES!!!**

Legal Net is useful for law firms because it is **EASY TO USE** and can be handed out to clients. **LATER**

Our company has licensed Legal Net software to 00 **LATER** **MOVE TO END** **END** **LATER**

multimillion dollar companies and currently have over 0000 **LATER** **MOVE TO END** **END** **LATER**

thousand users, one third of whom have never used a **LATER** **MOVE TO END** **END** **LATER**

computer before. **LATER** **MOVE TO END** **END** **LATER**

TOO WEAK Most important, it is a communication tool. Your attorneys **LATER** **MOVE TO END** **END** **LATER**

can use our software **LATER** **MOVE TO END** **END** **LATER** **LATER** **MOVE TO END** **END** **LATER**

in different locations **LATER** **MOVE TO END** **END** **LATER** **LATER** **MOVE TO END** **END** **LATER**

to collaborate on a central file that they all **LATER** **MOVE TO END** **END** **LATER**

have access to. So, **LATER** **MOVE TO END** **END** **LATER** **LATER** **MOVE TO END** **END** **LATER**

it's like having a bulletin board in the hallway for people to **LATER** **MOVE TO END** **END** **LATER**

post message or orders **LATER** **MOVE TO END** **END** **LATER** **LATER** **MOVE TO END** **END** **LATER**

attorneys can also communicate with other attorneys in your **LATER** **MOVE TO END** **END** **LATER**

offices around the country and around the world. **LATER** **MOVE TO END** **END** **LATER**

USE PRODUCT NAME MOVE UP It's got many features including electronic mail to send **LATER** **MOVE TO END** **END** **LATER**

messages or computerized memos or documents back and **LATER** **MOVE TO END** **END** **LATER**

forth, a channel to receive information from outside sources **LATER** **MOVE TO END** **END** **LATER**

such as LEXIS and newswire services, and channels that will **LATER** **MOVE TO END** **END** **LATER**

allow you to that you can fill with source or other **LATER** **MOVE TO END** **END** **LATER**

information. Anywhere a phone or fax can go, this software **LATER** **MOVE TO END** **END** **LATER**

can send information, because it runs over the phone lines. **LATER** **MOVE TO END** **END** **LATER**

EMPHASIZE THIS **LATER** **MOVE TO END** **END** **LATER** **LATER** **MOVE TO END** **END** **LATER**

change **LATER** **MOVE TO END** **END** **LATER** **LATER** **MOVE TO END** **END** **LATER**

an attorney's work **LATER** **MOVE TO END** **END** **LATER** **LATER** **MOVE TO END** **END** **LATER**

and give provide easy access to you without playing **LATER** **MOVE TO END** **END** **LATER**

telephone tag. And it's a less formal medium than a fax. You **LATER** **MOVE TO END** **END** **LATER**

can post questions, ideas or pieces of information to keep **LATER** **MOVE TO END** **END** **LATER**

clients in touch informally. **LATER** **MOVE TO END** **END** **LATER**

TOO NEGATIVE There's **LATER** **MOVE TO END** **END** **LATER** **LATER** **MOVE TO END** **END** **LATER**

nothing **LATER** **MOVE TO END** **END** **LATER** **LATER** **MOVE TO END** **END** **LATER**

to worry **LATER** **MOVE TO END** **END** **LATER** **LATER** **MOVE TO END** **END** **LATER**

about **LATER** **MOVE TO END** **END** **LATER** **LATER** **MOVE TO END** **END** **LATER**

starting with just a few disks and expansions needed. **LATER** **MOVE TO END** **END** **LATER**

YOUR OWN LEGALNET Now that we have refined our product and documented its **LATER** **MOVE TO END** **END** **LATER**

benefits, we are making it available to firms likely to reap **LATER** **MOVE TO END** **END** **LATER**

immediate benefits from using our product. **LATER** **MOVE TO END** **END** **LATER**

add a date and say why! I would appreciate an opportunity to demonstrate Legal Net to **LATER** **MOVE TO END** **END** **LATER**

you or your staff. I will follow up by telephone within the **LATER** **MOVE TO END** **END** **LATER**

next **LATER** **MOVE TO END** **END** **LATER** **LATER** **MOVE TO END** **END** **LATER**

week. **LATER** **MOVE TO END** **END** **LATER** **LATER** **MOVE TO END** **END** **LATER**

Sincerely, **LATER** **MOVE TO END** **END** **LATER**

TOO CONFUSING **LATER** **MOVE TO END** **END** **LATER** **LATER** **MOVE TO END** **END** **LATER**

MAKE THIS ONE SENTENCE FOR EMPHASIS **LATER** **MOVE TO END** **END** **LATER**

YES! 9000 ANALOGY USE IT BETTER **LATER** **MOVE TO END** **END** **LATER**

afew disks at a TIME **LATER** **MOVE TO END** **END** **LATER**

CALLY OFF **LATER** **MOVE TO END** **END** **LATER**

finishes her writing in the nick of time.

Perhaps, like this manager, you also come through only at the last minute. You may even believe that you need the deadline pressure in order to write. But if this is the only coping strategy you have for writing, you are paying too high a price.

Time managed by misconceptions

In school many of us were taught to write to prescribed lengths and formats (1,000 words in a five-part essay, for example) by teachers who focused on the form and mechanics of language rather than on the composition process. If your education was like this, you probably began writing with a strong mental image of the finished product. And you probably start at the top and work your way down to

ROUGH DRAFT

In her rough draft, the writer avoided fine-tuning anything. She knew that if she got hung up on a word at this stage, she would break the flow of language. She kept her prewriting notes in view to remind her of her purpose and audience.

the end, sentence by sentence, tediously perfecting and polishing each line as you go.

The time and energy you spend reworking your prose reduces even eliminates the need for full-scale revision, which deprives you of the heart of the writing process. From our point of view, the begin-at-the-beginning approach to writing is comparable to a

May 25, 1990

Mr. Jared Schneider
Managing Partner
Humber, Loretz & Abill
101 Park Avenue
New York, NY 10178

Dear Mr. Schneider:

I'd like to describe the easy-to-use Legal Net software, which can turn your personal computers into communications and conferencing tools for attorneys, staff, and clients.

All a user needs is a PC, a modem, and a copy of Legal Net software for access to features including electronic mail, to send messages, memos, or documents from computer to computer, and a channel to receive information from outside sources such as Lexis and other database and news-wire services. In addition, you get channels you or your users can fill with information you wish to share or discuss.

Legal Net can be a more powerful communications tool than phone or fax. For example, your attorneys can lend our software to several parties to a proceeding so that they can collaborate on joint briefs or agendas. Their work can be stored in a central file they can see and change on their individual computers. No matter what time zone or country the parties—or your attorneys or clients—occupy, they can use their computers like a bulletin board to post messages for each other or to discuss issues and modify documents without having them retyped.

Our company has licensed Legal Net software to 150 multimillion-dollar corporations and currently has over 8,000 individual users, one-third of whom have never used a computer before.

Now that we have refined Legal Net and proved and documented its benefits, we are making it available to firms most likely to reap immediate benefits with just a few disks and expand a few disks at a time, as needed. There is no monthly fee.

I would appreciate an opportunity to demonstrate Legal Net to you or your staff and will call your office on June 1 to arrange for an appointment.

Sincerely,

Janice Gotell
Vice President, Sales and Marketing

Michelangelo's trying to sculpt Moses by starting at the top of a block of marble and continuing straight down to the patriarch's feet.

Effective time management

The most efficient process for producing the high quality writing most managers demand of themselves begins quickly and ends slowly and meticulously. It involves four techniques that, as a whole, will allow you to write not only better but faster and without anxiety.

First, write to yourself. For most people, the single biggest problem is getting started. This initial procrastination usually is an ar-

FINISHED VERSION

As you can see by comparing the writer's editing on her rough draft with the finished copy above, she has moved various sections around to find the sequence that best meets her reader's needs. To evaluate her draft, she kept in mind the basic questions she had asked herself at the prewriting stage: What does the reader need to know right away? What am I asking him to do? In rereading the draft, she spotted lots of promising phrases that needed to be worded more forcefully. For example, she added a strong introductory sentence compiled from ideas she found scattered throughout the letter. She also relocated paragraphs, deleted unwanted material, checked spelling and punctuation, and added needed details (like why she would call, and when).

tempt to avoid the worry and stress associated with finding the right words. But there is no need at the preliminary stage of the process to get the perfect words on the page for the reader. You can begin by writing to yourself.

What should you write? For starters, absolutely anything. For example, you can write, "I hate to write. I don't know what to say. My mind is a blank." With no imaginary audience watching over your shoulder, you can prime the pump and thereby eliminate the need to procrastinate. You have begun to dissolve writer's block.

As soon as you have a stream of language flowing—and you will—begin writing to yourself about your topic: What are you trying to accomplish with this document? What do you want your reader to do or to know?

We are often asked about the wisdom of constructing a formal outline in this preliminary, or prewriting, stage. We believe it is a mistake to produce a very detailed outline before the first draft. Extensive outlining is useful only later as an aid in organizing the information that appeared (or didn't appear) in the first draft. On the other hand, a quick list of key points can be helpful. You may find this "jot" outline a useful prewriting strategy as long as you don't slavishly follow its order.

Take it from us: Even though this tactic may appear to add time to the writing process, professional writers know that making notes to yourself cuts down on the time otherwise lost procrastinating. Try it!

Second, start your rough draft anywhere but at the beginning. Traditionally the second phase of the writing process has been called the "rough draft." Yet novice writers avoid producing such a draft, not wanting to look at anything "rough" or create something called a "draft." But again, experienced writers will tell you that a rough draft saves time.

How should you write a rough draft? Very quickly. Start scribbling (or typing) whatever thoughts come most readily to you as you look at your prewriting notes. Do not stop to edit! Suspend all judgments about your output. Given the time you save now, you will have plenty left over to add or delete ideas or to rearrange their order and produce a powerful opening sentence. Editing is a separate step.

Third, put a summary sentence at the beginning. The best maneuver to quicken the pace of revision is to move a summary sentence or two to the top of your document. This should tell your readers exactly what you want them to do or to know. For example, "I am writing to introduce myself and Altheorum Consulting and to request the opportunity to sit down and explore how our firm could be of service to you and

your organization," or, "Can you help me straighten something out? Our accounting department tells me they have no record of payment by Squarecraft for two invoices that go back to October."

The point is that putting a summary statement—no matter how inelegant—at the beginning of your document will help you decide how to organize and shape the rest of it in the order most logical to your readers.

Last, edit your draft. There are two kinds of editing. The first involves simple fixes that require little stress or strain: You spot problems and you fix them. In most cases this entails one of the following:

- Crossing out verbiage (replacing, for example, "at your earliest possible convenience" with "soon")
- Turning a passive verb into an active one (changing "it will be determined" to "you will determine" or "we will determine")
- Splitting one long sentence into two.
- Correcting grammar, spelling and punctuation (or getting someone else to do it)

You may find that it saves time if you keep a list of the words that you most often misspell.

The second kind of editing is tackling sentences that don't say what you mean. At this point you may hear yourself saying "But I don't know how to fix this." Don't even try: The easiest and fastest way to solve the problem is simply to get rid of the offending sentence or clause and write a new one. There is no shortage of words; you can say what you mean in another way. You already are practiced at paraphrasing, since you do it all the time in conversation in order to clarify meaning. In the writing process, finding other words to say what you mean takes much less time than fixing badly made sentences.

To be certain that you have eliminated all problems of clarity and phrasing, we recommend one more step. Read aloud to yourself and listen as objectively as possible. Your ears will pick up anything "off" that your eyes have missed.

Novice writers often shy away from the techniques we've described because they appear to add, rather than save, time. But that just isn't the case. If you're willing to give up the notion that you should be able to get it right the first time and instead adopt the strategies we've described, you'll find yourself on the path to writing business documents better and faster—and without blood, sweat and tears. ■

BARRETT J. MANDEL, Ph.D., and JUDITH YELLEN are the founders of the Successful Writing Group, a New York-based organization that works with executives and managers in Fortune 500 companies to improve their business communications skills.



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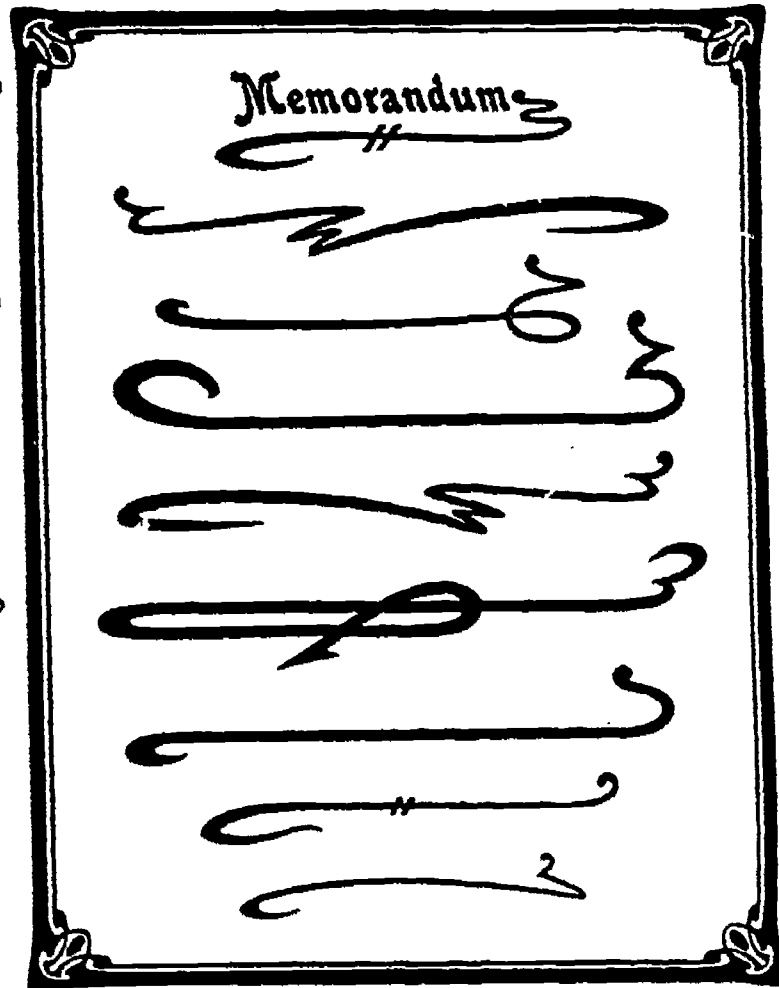
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□ MEMOS □



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Most memos are too ornate—even when they're not written with a quill pen. Too many words, too little point. Executives who have to read dozens of memos every day react like this:

"It's not clear what I'm supposed to do about this."

"What's the point?"

So put your idea in the first sentence. And if your company's memo pads offer you a subject line, put your idea there. If your memo stretches more than a page, you need a summary at the top. Not just a statement of the topic ("In this memo I will discuss . . ."), but a stand ("We should eliminate the Dallas plant because . . ."). And even a one-paragraph memo becomes clearer—works faster—when you start with the point.

Don't begin with the background, sidling up to your subject ("The purpose of this memo . . ."), or with elaborate definitions, warnings about the scope of the memo to come, personal remarks (unless you've got nothing else to say). If you must include any of this, put it below your opening. Subordinate the insignificant to the meaningful.

Make a Definite Recommendation

Go beyond analysis to say what you think the reader—and you—should do next. This makes the memo a trigger for action, not just another excuse for delay.

Sometimes you know what should be done, but you don't want to do it. Or you know that to decide, you need to collect some figures or interview an expert. If you're putting off that work, then you'll resist making any clear recommendation in your memo. Here's what you'll sound like:

MEMORANDUM

DATE: December 8
TO: Vice President Merker FROM: Mel Burrows
SUBJECT: Disk Drive Failures

We have had problems with defective disk drives. This has been going on for a year. At first, we thought we could just change our manufacturing procedures, but that led to even more failures. We're now getting less than 20% of the product past Quality Assurance. Now we could go back to engineering, and ask for a new de-

MEMOS

sign, but that might take six months or a year. Or we could go out and buy a different drive right off the shelf. Or we could just manufacture an awful lot of them, so we could use the 20% that work. I'm not sure whether Manufacturing can handle that kind of volume. What do you think? We've got to do something soon, to meet our shipments.

"We've got to do something now." Sure, but it won't be done too fast. At least, not by Mel.

Before you write, then, take the time to do what any reader's probably going to tell you to do. Talk to the manufacturing people. Research the subject enough so you can make a considered recommendation. And ask yourself: am I prepared to act on my own recommendation? If not, revise it.

Make It Even Shorter

When you've got a first draft, go through it looking for parts to cut. Can you shrink a paragraph to a line or two? Do so, and you've chopped away some of the underbrush, so a reader can spot your ideas right off. Avoid this sort of thing:

MEMORANDUM

DATE: December 31
TO: Hank Holquist FROM: Mel Burrows
SUBJECT: Length of Memoranda

It has come to my attention, from various sources, that some people have the feeling that our company memos are getting a little long-winded. Now I don't oppose a little detail, and I always want to hear what you have to say, but I'd like you to issue a general memorandum warning people to keep the length of all but the most important or well-researched memos short, so we don't have to spend all day reading them. If you know what I mean.

Give the Reader Air

White space helps. Open up the page so the reader's eye can zoom in on key parts, without getting stalled by a big block of type.

When possible, use headings to break up the text. With lists, spread out the items with bullets or numbers, and let some blank lines sneak in between them.

Here's one memo that started as a clump. See how much easier it is to skim after the text has been given some breathing room.

BEFORE:

MEMORANDUM

DATE: December 12
TO: Jim Brandon FROM: Mel Burrows
SUBJECT: Contract with CDN-Nippon

We should give our drive-shaft contract to CDN. The main benefits: they have the longest experience with this particular engineering, they have manufactured more of this model than anyone else, they are offering us a price 12% below any of their competitors; plus, we've worked with them before, and found their failure rate to stay consistently below 3%. The drawbacks: a month delay in startup, due to their previous commitments, and a guarantee of first option on the next contract. Our lawyers say these conditions are OK. So let's sign.

AFTER:

MEMORANDUM

DATE: December 12
TO: Jim Brandon FROM: Mel Burrows
SUBJECT: Contract with CDN-Nippon

We should give our drive-shaft contract to CDN.

MEMOS

THE BENEFITS:

—They have the longest experience with this particular engineering.

—They have manufactured more of this model than anyone else.

—Their price is 12% below the lowest competitor.

—We've worked with them before.

—Their failure rate is consistently below 3%.

THE DRAWBACKS:

—A one-month delay, due to their previous commitments.

—They want a guarantee of first option on our next contract.

CONCLUSION:

Our lawyers give the OK. Let's sign.

Use Familiar Organization

To speed your reader's access to your main point, follow a traditional way of organizing your material: problem and solution; main idea and proofs; and effect and causes. The reader will recognize each of these arrangements quickly, and will know where to look for your recommended course of action.

Steer clear of a simple-minded plod through events in chronological or geographical order—easy for you, but hard on the reader. Such lists exhaust themselves without building to a conclusion. They leave the reader wondering what you make of all this information—and why you're asking him or her to wade through it.

Put Your Key Idea First

Basically, move from the most important to the least important. A memo is not an opera, a cocktail conversation, or a nineteenth-century novel.

"I know there's a problem, but what does this guy think should be done about it?"

"I didn't just want facts—I wanted her opinion."

Before you write, think out your aim. If you're not clear about that, your reader won't be. What do you want your memo to do?

- To get action: persuade the boss to okay your new plan; set a deadline and schedule for a group; confirm what you will do, and what you expect others to do.
- To avoid blame: "report" the facts, while justifying yourself, or "make your case" in the files.
- To answer a question: make an argument for your ideas, under the guise of a neutral report; or say what policy you recommend.

So Make a Point

Show what you expect your reader to do next—approve your idea, blame someone else, okay your budget. Even when someone has asked you to "just outline the situation," they are likely to ask for your suggestions. Save time and put them in writing now.

Of course, saying what you think commits you to a position. You have to take a stand and not weasel out of it halfway through or mound up so much mush around your idea that no one will ever spot it again. (Cowardice breeds bad writing as its camouflage.) Be brave enough to make a real point.

Rewrite

Many people think a memo's just a note, so they can ramble on and on and touch on this and that and exit leaving a pile of

MEMOS

words behind. In fact, dictation encourages meandering memos like this:

MEMORANDUM

TO: Dan Knipper
SUBJECT: Marketing Meeting

DATE: December 10
FROM: Mel Burrows

Way back last October when we first got around to planning this meeting, I thought I would be back from the NCA conference—it's going to be in Hawaii this year, thank God—I'm looking forward to getting a good tan, too. Well, anyway, I figured I could easily be back in town by the 21st, but now I've got to stop off in Los Angeles on the way back, to talk to some of our subcontractors on the Galaxy Project. So I'm not sure now whether I will be back by the 21st, or even the 22nd. I'm just not sure how bad the situation is there. So what about the 23rd? Nobody really wants to meet on Christmas eve, right? I've tried reaching you on the phone, but your secretary couldn't speak to your schedule, so I figured I'd better send you this. Let me know what's best for you. Of course, when I get in, I'll be brushing sand off me. Know any good restaurants in Honolulu?

Try reducing that to two sentences—or one. You can cross out 90 percent of what's there. That done, the point emerges. And with a few changes, you've got a memo someone can answer without spending five minutes following the twists and turns of Mel's free-associating mind.

Remember, it takes longer to say something briefly—you have to cut out so much. So figure on revising two or three times, if you want the reader to grasp your idea quickly, and act on it.

Get Out Fast

Stop before your memo becomes a full-dress research paper. At the bottom of the page there should be no more than the typist's initials, and an alphabetized distribution list, if it's too long to be put on the "to" line. No "sincerely yours," and no flourishes.

If you're stapling on attachments, fine, but make sure you've described them in the memo, so the reader's prepared. And ask yourself: is this really a part of my presentation? Or is it just decoration? If it is just extra weight, leave it out.

A Memo on Memos

MEMORANDUM

TO: You

DATE: February 15

FROM: Jonathan Price

SUBJECT: How to Write Memos

Put your main point at the start!

- Rewrite.
- Give the reader air.
- Use familiar organization.
- Put your key idea first.
- Make a definite recommendation.
- Make it even shorter.
- Get out fast.

Clear Writing Means Clear Thinking Means...

MARVIN H. SWIFT

Foreword

Very few people have the ability to write effortlessly and perfectly; most of us must sweat over the process

MARVIN H. SWIFT

nor importance points up a constant management challenge of major importance—the clear and accurate expression of a well-focused message.

If you are a manager, you constantly face the problem of putting words on paper. If you are like most managers, this is not the sort of problem you enjoy. It is hard to do, and time consuming; and the task is doubly difficult when, as is usually the case, your words must be designed to change the behavior of others in the organization.

But the chore is there and must be done. How? Let's take a specific case.

Let's suppose that everyone at X Corporation, from the janitor on up to the chairman of the board, is using the office copiers for personal matters; income tax forms, church programs, children's term papers, and God knows what else are being duplicated by the gross. This minor piracy costs the company a pretty penny, both directly and in employee time, and the general manager—let's call him Sam Edwards—decides the time has come to lower the boom.

Sam lets fly by dictating the following memo to his secretary:

To: All Employees
From: Samuel Edwards, General Manager
Subject: Abuse of Copiers

It has recently been brought to my attention that many of the people who are employed by this company have taken advantage of their positions by availing themselves of the copiers. More specifically, these machines are being used for other than company business.

Obviously, such practice is contrary to company policy and must cease and desist immediately. I wish therefore to inform all concerned — those who have abused policy or will be abusing it — that their behavior cannot and will not be tolerated. Accordingly, anyone in the future who is unable to control himself will have his employment terminated.

If there are any questions about company policy, please feel free to contact this office.

Now the memo is on his desk for his signature. He looks it over; and the more he looks, the

of revision, drafting, and redrafting until we get it right. Equally, very few people think accurately enough so that mere transcriptions of "what they have in mind" can serve as intelligent communications. Here the author points out that we tend to revise our words and refine our thoughts simultaneously; the improvements we make in our thinking and the improvements we make in our style reinforce each other, and they cannot be divorced. His analysis of the way in which a manager reworks and rethinks a memo of mi-

worse it reads. In fact, it's lousy. So he revises it three times, until it finally is in the form that follows:

To: All Employees
From: Samuel Edwards, General Manager
Subject: Use of Copiers

We are revamping our policy on the use of copiers for personal matters. In the past we have not encouraged personnel to use them for such purposes because of the costs involved. But we also recognize, perhaps belatedly, that we can solve the problem if each of us pays for what he takes.

We are therefore putting these copiers on a pay-as-you-go basis. The details are simple enough. . . .

Samuel Edwards

This time Sam thinks the memo looks good, and it is good. Not only is the writing much improved, but the problem should now be solved. He therefore signs the memo, turns it over to his secretary for distribution, and goes back to other things.

From verbiage to intent

I can only speculate on what occurs in a writer's mind as he moves from a poor draft to a good revision, but it is clear that Sam went through several specific steps, mentally as well as physically, before he had created his end product:

- He eliminated wordiness.
- He modulated the tone of the memo.
- He revised the policy it stated.

Let's retrace his thinking through each of these processes.

Eliminating wordiness

Sam's basic message is that employees are not to use the copiers for their own affairs at company expense. As he looks over his first draft, however, it seems so long that this simple message has become diffused. With the idea of trimming

the memo down, he takes another look at his first paragraph:

It has recently been brought to my attention that many of the people who are employed by this company have taken advantage of their positions by availing themselves of the copiers. More specifically, these machines are being used for other than company business.

He edits it like this:

Item: "recently"

Comment to himself: Of course; else why write about the problem? So delete the word.

Item: "It has been brought to my attention"

Comment: Naturally. Delete it.

Item: "the people who are employed by this company"

Comment: Assumed. Why not just "employees"?

Item: "by availing themselves" and "for other than company business"

Comment: Since the second sentence repeats the first, why not coalesce?

And he comes up with this:

Employees have been using the copiers for personal matters.

He proceeds to the second paragraph. More confident of himself, he moves in broader swoops, so that the deletion process looks like this:

Obviously, such practice is contrary to company policy and must cease and desist immediately. I wish therefore to inform all concerned—those who have abused policy or will be abusing it—that their behavior cannot and will not be tolerated. Accordingly, anyone in the future who is unable to control himself will have his employment terminated. will result in dismissal.

The final paragraph, apart from "company policy" and "feel free," looks all right, so the total memo now reads as follows:

To: All Employees
From: Samuel Edwards, General Manager
Subject: Abuse of Copiers

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MARVIN H. SWIFT

Employees have been using the copiers for personal matters. Obviously, such practice is contrary to company policy and will result in dismissal.

If there are any questions, please contact this office.

Sam now examines his efforts by putting these questions to himself:

Question: Is the memo free of deadwood?

Answer: Very much so. In fact, it's good, tight prose.

Question: Is the policy stated?

Answer: Yes—sharp and clear.

Question: Will the memo achieve its intended purpose?

Answer: Yes. But it sounds foolish.

Question: Why?

Answer: The wording is too harsh; I'm not going to fire anybody over this.

Question: How should I tone the thing down?

To answer this last question, Sam takes another look at the memo.

Correcting the Tone

What strikes his eye as he looks it over? Perhaps these three words:

- Abuse . . .
- Obviously . . .
- . . . dismissal . . .

The first one is easy enough to correct: he substitutes "use" for "abuse." But "obviously" poses a problem and calls for reflection. If the policy is obvious, why are the copiers being used? Is it that people are outrightly dishonest? Probably not. But that implies the policy isn't obvious; and whose fault is this? Who neglected to clarify policy? And why "dismissal" for something never publicized?

These questions impel him to revise the memo once again:

To: All Employees
From: Samuel Edwards, General Manager
Subject: Use of Copiers

Copiers are not to be used for personal matters. If there are any questions, please contact this office.

Revising the Policy Itself

The memo now seems courteous enough—at least it is not discourteous—but it is just a blank, perhaps overly simple, statement of policy. Has he really thought through the policy itself?

Reflecting on this, Sam realizes that some people will continue to use the copiers for personal business anyhow. If he seriously intends to enforce the basic policy (first sentence), he will have to police the equipment, and that raises the question of costs all over again.

Also, the memo states that he will maintain an open-door policy (second sentence)—and surely there will be some, probably a good many, who will stroll in and offer to pay for what they use. His secretary has enough to do without keeping track of affairs of that kind.

Finally, the first and second sentences are at odds with each other. The first says that personal copying is out, and the second implies that it can be arranged.

The facts of organizational life thus force Sam to clarify in his own mind exactly what his position on the use of copiers is going to be. As he sees the problem now, what he really wants to do is put the copiers on a pay-as-you-go basis. After making that decision, he begins anew:

To: All Employees
From: Samuel Edwards, General Manager
Subject: Use of copiers

We are revamping our policy on the use of copiers. . . .

This is the draft that goes into distribution and now allows him to turn his attention to other problems.

The Chicken or the Egg?

What are we to make of all this? It seems a rather lengthy and tedious report of what, after all, is a routine writing task created by a problem of minor importance. In making this kind of analysis, have I simply labored the obvious?

To answer this question, let's drop back to the original draft. If you read it over, you will see that Sam began with this kind of thinking:

- "The employees are taking advantage of the company."
- "I'm a nice guy, but now I'm going to play Dutch uncle."
- "I'll write them a memo that tells them to shape up or ship out."

In his final version, however, his thinking is quite different:

- "Actually, the employees are pretty mature, responsible people. They're capable of understanding a problem."
- "Company policy itself has never been crystallized. In fact, this is the first memo on the subject."
- "I don't want to overdo this thing—any employee can make an error in judgment."
"I'll set a reasonable policy and write a memo that explains how it ought to operate."

Sam obviously gained a lot of ground between the first draft and the final version, and this implies two things. First, if a manager is to write effectively, he needs to isolate and define, as fully as possible, all the critical variables in the writing process and scrutinize what he writes for its clarity, simplicity, tone, and the rest. Second, after he has clarified his thoughts on paper, he may find that what he has written is not what has to be said. In this sense, writing is feedback and a way for the manager to discover himself. What are his real attitudes toward that amorphous, undifferentiated gray mass of employees "out there"? Writing is a way of finding out. By objectifying his thoughts in the medium of language, he gets a chance to see what is going on in his mind.

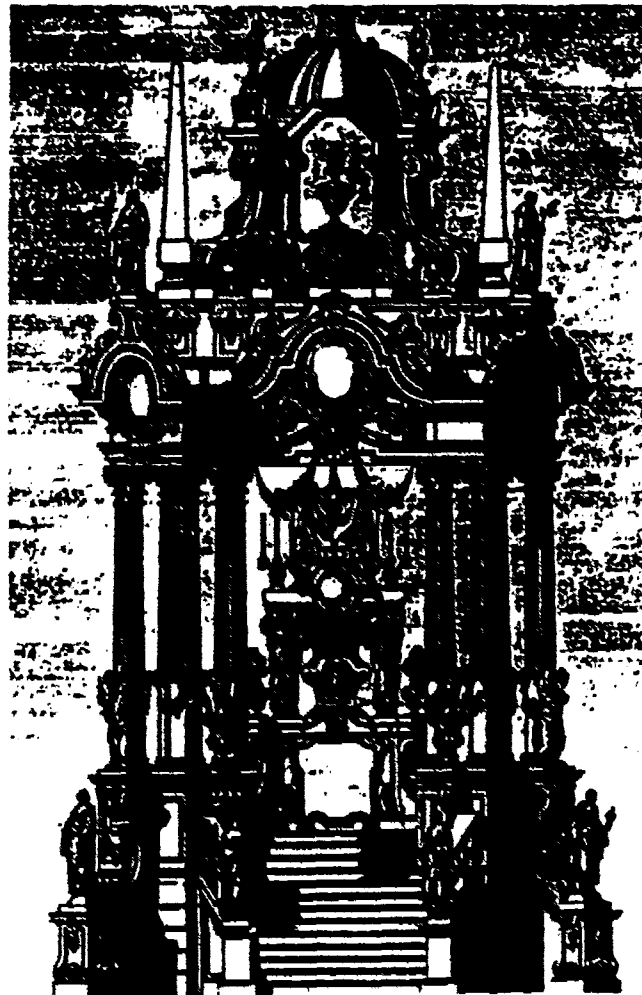
In other words, *if the manager writes well, he will think well*. Equally, the more clearly he has thought out his message before he starts to dictate, the more likely he is to get it right on paper the first time round. In other words, *if he thinks well, he will write well*. Hence we have a chicken-and-the-egg situation: writing and thinking go hand in hand; and when one is good, the other is likely to be good.

Revision Sharpens Thinking

More particularly, rewriting is the key to improved thinking. It demands a real openmindedness and objectivity. It demands a willingness to cull verbiage so that ideas stand out clearly. And it demands a willingness to meet logical contradictions head on and trace them to the premises that have created them. In short, it forces a writer to get up his courage and expose his thinking process to his own intelligence.

Obviously, revising is hard work. It demands that you put yourself through the wringer, intellectually and emotionally, to squeeze out the best you can offer. Is it worth the effort? Yes, it is—if you believe you have a responsibility to think and communicate effectively.

□ **KEEP IT SHORT** □



*Reproduced for educational purposes only,
from Jonathan Price, 'Put That in Writing!'*



This is what too many reports end up looking like: extra comments piled on top of unnecessary sections, surrounded with useless appendices, decorated with flourishes, monuments, and filigree work. At the center, a catafalque for any idea the writer may have started with. Inside that, a coffin.

This over-decoration buries your meaning. So, if you're not

making sets for an eighteenth-century opera, keep it short. Pare away the extras.

Short words, short sentences, short paragraphs. Why?

- They're easy to digest.
- I can see what it's about, fast.
- I don't get cross-eyed looking at the page.
- I get frequent breaks, between the blocks of prose.

So, despite what you may have learned in school and the military, choose the small word over the big one as you write. Sometimes, of course, you must use the twenty-eight-letter term because it's the only accurate word. But when you do find two words that mean the same thing, prefer the shorter one. For instance,

REPLACE THIS:

Activate
Implement
Initiate
Modification
Preparatory to
Re-initialize
Utilize

WITH THIS:

Start
Run
Start
Change
Before
Start over
Use

Reduce phrases, too.

REPLACE THIS:

At this point in time
Due to the fact that
Exhibits a tendency
I am of the opinion that
In a certain number of instances
You will find enclosed

WITH THIS:

Now
Because
Tends
I think
Sometimes
Here is

If you do this, your sentences will tighten up, too. Long sentences are hard to follow. Most people can remember seven or

KEEP IT SHORT

eight words at a stretch. After that, they begin to lose track. Compare these two sentences:

46 WORDS:

For the product we have just been discussing, our reported sales figures show a definite decline in the number of units being sold, but on the other hand our profit-and-loss sheets also can be examined to indicate an equally definite uptick in dollar volume.

7 WORDS:

We sold fewer units, made more dollars.

Which is easier to grasp? Has any meaning been lost?

I'm not recommending that you make every sentence seven words long. You'd sound like a robot—choppy and not too bright. Vary the length of your sentences according to their meanings. But trim every one. That way, when you need to make a point, you can emphasize it by drawing up short. Get it?

"Every word you add dilutes the sentence," says the contemporary American poet Miller Williams. In fact, whenever you throw in a significant qualification, you risk distracting the reader from the main idea. So watch out for sentences that:

- Combine three or four ideas. Sort them out into three or four sentences.
- Have more than one adverbial clause (beginning with *when*, *because*, *although*, *whereas*, *after*, and *before*). A hint that one should start another sentence.
- Contain more than one *that*, *which*, or *who* clause. Who's who? Which which is that? Again, a sign to turn one sentence into two or three.
- Take up more than three regular lines of text.

Look at the length of your paragraphs, too. Few things repel readers more than paragraphs that take up three-

quarters of a page. Leave that to novelists like William Faulkner.

To trim a paragraph, you can:

- Make sure you've got events in order. This may cut your paragraph in half, if you've been jumping forward and doubling back.
- Ax sentences that repeat the same information, with some minor variation or flourish.
- Leave out redundant examples.
- Throw out anything that does not focus on the central idea of this paragraph.

Here's an example:

ORIGINAL:

Our study showed that potential customers preferred even U.S. savings bonds to stocks. For instance, some would rather put their money in life insurance. Others preferred to refinance their mortgages. Some just put their money in savings accounts. Remember that in our survey we asked people what they would do with \$10,000 extra cash. We found stocks came in ninth, after other types of investment. Another way to put this is that our brokers face a difficult job persuading people to shift funds out of these other types of investment, into stocks. Of course, we may need to hire a different breed of broker. But that's another kettle of fish. The really important thing to keep in mind here is that we have a hard row to hoe before we'll get people to invest in stocks.

REVISION:

When we asked potential customers what they would do with \$10,000 extra cash, they said they'd put it in eight

KEEP IT SHORT

types of investment—including life insurance and U.S. Savings Bonds—before they bought stocks. So our brokers face a difficult job of persuasion.

A paragraph ought to express an idea—one idea. The sentences inside offer refinements, details, evidence. If they don't support that idea, they're in the wrong paragraph.

In some ways writing resembles carpentry. The longer most carpenters work, the more they love simple forms. When the Italian designer Giuseppe Galli Bibiena showed an old carpenter the design for the elaborate monument in the picture at the beginning of this chapter, the carpenter asked, "Is it a cake or a tomb?"

You Are What You Write: Model Memos for All Occasions

DIANNA BOOHER

"The further away your job is from manual work, the larger the organization of which you are a part, the more important it will be that you know how to convey your thoughts in writing and speaking," wrote Peter Drucker in *People and Performance*. Fairly or not, many readers evaluate executives by the memos leaving their desks. Colleagues, clients, and the business community label a service or product by them. Subordinates judge fairness and ability by them. Grammar and spelling are important, certainly, but just as important—and harder to perfect—are brevity, clarity, and the tone of the message. The best directive does not simply direct; it also explains. A complaint will be more effective if it carries a feeling of conciliation and confidence.

The examples presented here illustrate how to write—and how not to write—memos for various occasions. Remember, memos are more than a forum for opinions; they are a way of dealing with people.

Directives

Weak Models

Subject: Copy Machine Use

The largest collating copier located on the second floor has been installed for use by Materials and Services personnel only. It's the responsibility of everyone in the building to show common courtesy in scheduling large copying tasks so as not to prohibit day-to-day operations in all sections.

Subject: Protocol for Phone Calls

Once more I must remind you that there are some members in the field who violate protocol and make phone calls to various staff members in Boston, asking for particular business and personal favors. This must stop once and for all!

In the past I have requested from you an explanation of each week's long-distance calls to both Boston and Los Angeles. Some of you have complied; some have ignored the directive. Only emergency calls should be made to Boston and Los Angeles; all other favors or requests should come through my office.

I will be monitoring this situation carefully.

*Reproduced for educational purposes only,
from Rita Newman, Communicating
in Business Today, DC Heath, 1987*

Don'ts

- Don't bury your directive in implications. In the first example, what exactly is the directive? That no one in the building other than Materials and Services personnel may use the second-floor copier for any reason—emergency or otherwise? That Materials and Services people should not tie up the copier for long periods of time? That people in other departments should be more courteous in scheduling large tasks so as not to force others to go to the second-floor machine? That large tasks should be done before or after peak hours? Remember that even though your intention may be to soften the directive, your reader may not infer what you intend.
- Don't be arbitrary. When possible, give reasons. Why is the phone-call protocol necessary?
- Don't fail to give all details necessary to take the action, or inaction, as the case may be. For instance, how should readers of the second memo distinguish between emergency and "regular calls?" What are the guidelines?
- Don't use such "fight" words as "ignored," "failed to," "refused," even "must" at times. Such words emphasize a negative and hostile attitude.
- Don't resort to sarcasm.

Good Model

Subject: Air-Conditioning Filter Screens

Since our discussion three weeks ago, nothing has been done to correct the problem of the air-conditioning filter screens. Please install them immediately and confirm to me in writing when they are in place.

Apparently you disagree with my opinion that the cost of the manpower involved in testing for the exact problem is prohibitive. Nevertheless, whether the screens do or do not solve our problem, this ounce of prevention should be our first step.

If you have any problem in the installation process, please let me know so that we can work them out immediately.

Dos

- State the clear, firm directive up front. If necessary, ask the subordinate to verify compliance.
- Give reasons for your directives when you can. Giving reasons does not suggest weakness or the need for justification of your decisions. Instead, reasons help the reader to determine whether to approach you again if the situation or circumstances change, thus allowing correction. People cooperate better with a "why" even when they don't agree.

- Give all details and guidelines to accomplish the directive. Include times, dates, costs, preparation, procedures, and expected follow-up. Missing details provide an escape hatch for reluctant followers.
- Acknowledge that the reader may not agree with your evaluation of the situation, but be firm about your directive nonetheless.
- Include courtesy words even when you have authority to command.

Complaints

Weak Model

Subject: Computerized Purchasing System

Your Mr. Tom Brown and Fred Smith visited me this week and wanted to know where I wanted two data-processing consoles installed. I had no idea what they were talking about, and yet they told me you had advised that we were to receive this equipment in March. I told them to forget about installation until I had been informed of what all this is about and what your intentions are.

On January 6 I sent a memo to your Mr. Ted Jones to confirm a meeting with him. Enclosed with the memo were our comments on the data printout form he was proposing. We received absolutely no response from him, nor have we had subsequent discussions of how our needs could be programmed.

Then on February 16, when we questioned the purpose of your requisition 1224-55 for contract programming services, we phoned your office again. We were assured that this invoice had nothing to do with our project but rather was for work done for the Indonesian group.

Frankly, John, I'm upset over this development. You have not kept me informed on progress nor advised me of your intentions.

Obviously, we do not plan to proceed with anything until we know what is involved, what is required, and why it is required. Frankly, we don't believe that computer programmers should decide what the user should have. I had assumed from our initial discussions that the development of a purchasing-system program would be a mutual task between us—not a unilateral decision from your end. Obviously, I was wrong.

Don'ts

- Don't start with once-upon-a-time detail. The reader here cannot be sure of the exact nature of the complaint until the fourth paragraph above.
- Don't omit detail about the *real* problem. The reader must have enough explanation to follow the developments and correct the situation. In this case, the reader still does not know where his programmers and the memo writer differ about computer needs: Is the actual program design inefficient for the purchasing department, or is the writer simply

angry that he didn't have the proper input and notification? The person handling the complaint from this point must read between the lines or pull the past memos and meeting minutes from the files to see which is the case.

- Don't fail to suggest how the problem can be remedied. In this case, the reader has no clearly outlined steps to follow to mend damage to the relationship or to the project.
- Don't use a self-righteous or aggressive tone. Note the "fight" words in this model: "Your Mr. Tom Brown and Fred Smith" and "your Mr. Ted Jones" (patronizing); "I had no idea what they were talking about" (exaggeration—of course he had some idea); "forget about installation" (hint of patronizing dismissal); "your intentions" (sounds as if they are underhanded); "I'm upset. . . . You have not kept me informed. . . ." (personal attack); "Frankly, we don't believe that computer programmers should decide what the user should have" (assumes that this is the reader's intention); "Obviously, I was wrong" (sarcastic, self-righteous statement).

Good Model

Subject: Passing the Buck, er, Boxes

Help, I've got a problem. Would you lend a hand to a department and damsel in distress? We need the counter and cabinet space in the copier room, which is now filled to overflowing with boxes of computer paper.

Our only consolation is that Data Processing is using computer paper like Carter's Little Liver Pills. Ah, and even that provides only temporary relief before the little blue delivery truck unloads more boxes on our turf.

I spoke with John Ikeman about moving these boxes, who spoke with Fred Little, who spoke with Harold Smith, who at last mention had spoken with everybody except the pope. All to no avail. According to all supervisors, their own storage space is occupied by things from outer space—or at least from someone else's department.

Any help you can provide to get other departments to remove their paper and supplies from our copier room (even trapdoors may be a possibility) will be appreciated. Otherwise, the next time the little blue delivery truck pulls up, I may have to leave in a little white van.

Dos

- Let the reader know immediately what your exact complaint is.
- Suggest, even if you can't command, the action you want your reader to take to resolve the problem. Leaving correction to your reader's discretion increases the likelihood that the complaint will not be handled quickly and appropriately. If you have no suggestions, say so.
- Give enough detail so that the person stepping in to remedy the situation knows or recalls what has happened in the past. But be brief; avoid throwing in irrelevant details about how much trouble the situation has caused you—unless such detail is pertinent to correcting the problem or creates urgency. Always give names or dates involved and copies of past correspondence for the reader's convenience in following and verifying what you say. By informing the reader of your previous action, you eliminate repetition of those nonsolutions.
- Use a conciliatory tone. First, that means not assuming that the harm or mistake has been intentional. Don't take away all your reader's possible "excuses" for the situation; allow him to save face. (There's no harm in his saving face as long as the problem gets corrected.) Second, use "I messages" to minimize attack on the other person: "I do not feel that my staff and I are up-to-date on the project or that we've had sufficient input about our specific needs." Not: "You have not kept us up-to-date on the project and you have not allowed us sufficient input about our specific needs." Also, play down a self-righteous tone by passive-voice rather than active-voice constructions: "A problem has

developed." Not: "You have created a problem."

- Show confidence that the complaint will be handled appropriately.
- End on a business-as-usual note.
- Use humor when you can to attract attention to the problem and make the corrective action less arduous. Make sure, however, that you know your audience, so that your humor is not offensive and does not make light of a situation that others consider no laughing matter.

Pointing Out Another's Errors

Weak Model

Subject: Handling Incentive Payments

One more time, everybody. Although some of you have been handling incentive computations for years, I still find persistent errors. For the last time, I do hope we can get this straight!

You are to send *three* (not one, not two) copies of the incentive computation forms. After I review and approve the forms, I will send one to the sales rep and one to Beaumont, and then keep one for my files. Each of you has a copy machine; please use it.

When you do your computations on the sales split, be sure to compute your figures accurately—I have found several errors here again.

Please, if you have further questions about this record-keeping system, call me before you send the forms, I would appreciate your assistance in doing this correctly.

Don'ts

- Don't patronize. Even the insertion of courtesy words such as "please" and "appreciate" fails to compensate for sarcasm. Watch unusual punctuation marks and underlined words to avoid "screaming" in print. Also, avoid showing your "tolerance" in overlooking or correcting another's error.
- Don't assume that the error is intentional or due to carelessness. Consider the possibility that your instructions have been unclear or

YOU ARE WHAT YOU WRITE: MODEL MEMOS FOR ALL OCCASIONS

...circumstances prevented compliance or perfection. At the very least, consider that the reader may not have been aware of the importance of accuracy. Assume some of the responsibility for the error yourself.

- Don't focus on the error to the exclusion of how the matter should be corrected. Your memo should not begin a game of "gotcha."
- Don't exaggerate results of the error. If the reader thinks you have overplayed the subject, he'll compensate by playing down its importance.

Good Models

Subject: Handling Incentive Payments

There are still some problems in routing incentive forms and computing payments. Let me repeat the procedure for handling such forms:

Send three copies of the incentive-computation forms to me. After I review and approve the forms, I'll send one to the sales rep and one to Beaumont and then keep one for my files.

Please make a special effort to recheck all computations before they leave your office. We do not have the manpower to do this double-checking here. When checks go out incorrectly and must be returned and reprocessed, the cost goes up considerably, not to mention the inconvenience of the delayed payment.

If you have any questions at all about this record-keeping system and routing, or about computing unusual splits, please call me before sending the forms. I appreciate your help in handling these correctly.

Subject: Leasehold Improvements—Account 468

Thanks for your memo on the Cedarpoint account; I do understand your reasoning behind expending the costs for remodeling the headquarters office.

In my opinion, however, these expenditures should be accounted for as leasehold improvements. Here's my reasoning:

1. The improvement's useful life exceeds one year.
2. Generally accepted practice is to capitalize

and depreciate these improvements over the remaining term of the lease.

I'd like to give this further thought and talk to Ed Weese before I ask you to make definite changes. If I'm wrong, I assure you, it won't be the first time.

Do's

- Begin on a neutral note. Then "creep up" on the error if you can. Notice that in the cash-forecast memo, the writer simply offers a better method to accomplish the task rather than pointing out the deficiency per se. Passive-voice constructions can be useful here: "In the future, spare parts should be sent by air freight." (You do not say that the sender has made a mistake this time.) At other times, you can walk around a direct assault with a "there are problems" approach, as in the revised incentive-payment model.
- Focus on what you have done or what the reader should do to correct the problem, rather than trying to assign blame.
- Emphasize the importance of accuracy.
- Suggest precautions against future problems.
- Show diffidence and humility.

Admitting Your Own Errors

Weak Model

Subject: Boyton Contracts

I deeply regret my error in mailing the Boyton contracts to Mr. Jorgensen's old address. It's our policy always to verify new and existing addresses by phone before we mail any such documents. I don't know how we could have overlooked this client's address.

Certainly, I can understand why Mr. Jorgensen was so upset when he phoned you yesterday about the delay. If he had called here, I would have been glad to assure him that the error was completely mine. Please let me assure you that this kind of error does not happen often, because I realize the importance of a timely signature.

DIANNA BOOHER

The returned contracts went out today by Express Mail; I do hope this mistake has not jeopardized the negotiations in any way. My sincerest apologies; this won't happen again.

Don'ts

- Don't "bleed" all over the memo. Briefly explain how the error happened and then focus on the correction.
- Don't be dramatic. Remember that all errors are not created equal. Overblown apologies and explanations sound insincere.
- Don't promise that the error will never occur again. Rather, state what actions you have taken to correct the problem and to make its recurrence less likely.

Good Model

Subject: Incorrect Number on Pumping Order

Yes, my scheduler did indeed make an error on the attached pumping order; he used the custody index number rather than the transfer code.

I have cautioned him about confusing the numbers on future orders and have asked him to check his hard copy of all orders after they have been entered into the computer.

Since we've had trouble before, I should have given closer supervision here. Please let me know if you uncover still other such errors; I'll follow them up immediately.

Dos

- State the error *and* correction immediately.
- Evaluate the seriousness of your mistake; explain and apologize accordingly.
- When the situation has political undertones to your disadvantage, play down the error with a matter-of-fact tone. After all, everybody makes mistakes. On the other hand, a poor-me approach can work sometimes—that is, exaggerate the seriousness of the error and be profuse in your apology so that your reader must console you that things aren't that bad. However, "bleed" only when you know the

politics involved and the probable reaction of your reader to your play for sympathy.

- Take responsibility for errors that come from your office; don't pass the buck to subordinates even though they may have made the error. After all, you are the supervisor.
- Report and correct the error immediately. Delay usually compounds the problem.

Policy Statements

Weak Model

Subject: Policy on Sick Days

Let me remind you that falsifying company records with regard to absence or sickness is a Class "A" Offense. The penalty for such an offense is immediate discharge without prior warning.

In order for you to be paid for sick days, a doctor's excuse must be presented to your immediate supervisor. If your illness is not severe enough to require a doctor's visit, then you may elect to take a vacation day—provided you are entitled to a vacation exceeding one week. If you are not eligible for vacation time longer than one week, you will not be paid for the absence due to sickness without a doctor's excuse.

Don'ts

- Don't state the policy in a negative format and tone. The first paragraph in this memo is a threat rather than a statement of benefit, which sick-pay policy really is. To give this information in a positive manner, begin the memo, "To be eligible for sick pay, you must present a . . ."; then, as a matter of further information, add a reminder about falsification of records.

Good Model

Subject: Change in Eligibility Requirements for Employee Stock-Purchase Plan

At the November board meeting, the directors of Forbas Manufacturing approved a change in the eligibility requirements for participation in the Employee Stock-Purchase Plan. Effective

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with the fiscal quarter beginning January 1, 1985, all employees who have completed one year of service with the company (prior policy called for two years of service) will be eligible to join the plan.

The Employee Stock-Purchase Plan is an effective savings plan in which 1,200 Forbas Manufacturing employees are now enrolled. In fact, during the past fiscal year, enrollment has increased by 46 percent.

New enrollments for each quarter must be received by the 10th day of the new quarter. Should you have questions about "jumping on the bandwagon," or if you want to get an enrollment form, contact Liz Smith (ext. 282).

Do's

- Summarize the policy up front.
- Use the subject line to distinguish between a new or revised policy and an already established one. Without such a subject-line clue, the reader often skips reading the memo, thinking that he is already informed about the stated policy.
- Mention the reasoning behind the policy or change in policy—unless it is obvious.
- As much as possible, make policy sound like guidelines and benefits rather than restrictions and penalties.
- Give clear instructions for following the policy.

To Cut, Watch, Or Justify Expenses

Weak Model

Subject: Mailing and Printing Costs

I have just come from the supply room; boxes and boxes of *Bylines* and thousands and thousands of financial statements are stacked around the room. Why? Obviously, you are printing too many copies of each, and that, in turn, creates a huge mailing cost in shipping excessive copies to all the branches.

Wayne, this is a function of your department. What have you done to develop a savings in mailing? What kind of controls do you have for not ordering hundreds of thousands of dollars

of extra printing? Something has to be done immediately.

As I review the operations of various offices across the country, I find over and over that those managers who control the checkbook and watch expenses make profits. Rarely do the big spenders pay attention to reviewing costs and rarely do they make a profit in difficult times.

I'm sending a copy of this memo to all who I think are involved in this plethora of printing and mailing, hoping you can get together with them to work out something to alleviate this problem.

Don'ts

- Don't base your request to cut or watch expenses on personal observation alone. You need facts to back up what you say; otherwise, the reader will probably argue that you have latched onto the "exceptional." If you don't want to gather the facts yourself, then ask the responsible person (perhaps your reader) to do so. Without authoritative data, the issue remains vague.
- Don't sound abrasive. In a "problem" statement, calling someone by name in direct address ("Wayne, this is a function of your department") makes the issue a personal attack. Including yourself in a we-need-to-cut-or-watch-expenses statement makes a much more palatable suggestion. Also, watch implications. The above model implies that Wayne is one of the "big spenders" who rarely make a profit.
- Don't reprimand by way of a cutting-expenses memo sent to more than one reader. In pointing out someone's weakness, communicate individually, not with a distribution list.

Good Model

Subject: Reducing Mailing and Printing Costs

Wayne, what can we do to reduce our mailing and printing costs? Down in the supply room, I noticed boxes and boxes of *Bylines* and last month's financial statements; I assume that these were leftover copies.

I'd like you to do some kind of study of our

actual printing and mailing costs and then see what we might do to control these expenditures. Here are some suggestions for your consideration:

1. Manual audit of mail-outs from each branch;
2. Combining financial statements and *Bylines* into one publication;
3. Cheaper mailing rates;
4. Survey of distribution problems.

We need to control the checkbook and watch pennies to make profits in these difficult times. Your suggestions for printing and mailing controls will insure that we do that. Thanks for your help; I'll look forward to your conclusions.

Dos

- State your concern immediately. Even in a persuasive memo, your reader still needs to know to what conclusion you intend to lead him. Without knowing the "bottom-line" message, he feels manipulated. Another inherent danger in building your case before making your request is that your reader may examine your evidence and arrive at an altogether different conclusion. By giving your statement of "wants" first, you can guide the reader's thinking toward your own conclusion.
- Include a *why*. Readers need motivation for both belt-tightening and spending.
- Translate vague costs to specific, understandable dollars when possible. Could you survey others for their opinions? Talk to experts from inside and outside the company? Do a literature search? Keep a log of the situation? Identify exact causes and calculate real savings or expenses?
- When ordering a "cut," offer alternatives. Suggest ways to accomplish the same activities with fewer dollars. Pinpoint your priorities for spending.
- When justifying expenses, anticipate alternative solutions and address them. What limitations do these other options have?
- Assume your part in the situation, making your reader feel that thrift is a team effort.
- Describe the financial climate accurately. You don't want to sound so ominous that you

create panic among the employees and have them scrambling for jobs elsewhere. Neither do you want to start a game of "Wolf, Wolf."

Reprimands

Weak Model

Subject: Interfering with Assigned Work

Would you please tell me what emergency at Bloomington's was so urgent that you pulled one of our men (Jack Donne) to be a "gofer" without getting his supervisor's approval?

Don'ts

- Don't hide a reprimand behind a trapping question. If the reader has committed an offense, say so. If you mean only to verify what you have been told or have assumed, ask for verification outright.
- Don't leave to the reader's discretion how you want the action, behavior, attitude, or situation corrected.

Good Models

Subject: Supervisory Approval on Change in Assigned Work

In the future, please be sure to get a supervisor's approval before changing anyone's job assignment.

Yesterday, Jack Donne was sent without his supervisor's approval to Bloomington's on what I consider a routine, rather than emergency, errand. Such a situation undercuts authority and may create serious problems with the abandoned project assignment.

Subject: Sick-Leave Restriction

This is to notify you that effective January 1, 1985, you must submit medical certification to support all absences due to illness. This restriction will remain in effect for at least six months and until further notice from me.

If your substantiated absences, medical or otherwise, exceed three days during the next six months, we will be forced to terminate your employment.

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You are being placed under this restriction because an analysis of your attendance record shows that some of your absences may have been unjustified. Your records show that you missed work on three Mondays and four Fridays during the last quarter: October 3, 14, 17, 24; November 4, 18; and December 2.

Do's

- Focus on the offense. Communicate clearly and specifically what behavior, attitude, or decision is in error and how you expect it to be corrected.
- Document your complaints and past reprimands.
- Impress upon the reader the importance for corrective action and get him to "buy into" complying with your request or company policy.
- When possible and not already obvious, explain why the behavior, situation, or decision needs correction or why the policy or rule has been established. A *why* generally improves cooperation.
- On second or later reprimands, warn the reader of your next action if the problem is not corrected.
- Try to minimize resentment by focusing on behavior and results or consequences rather than motives or intentions.
- Match your tone to the seriousness and frequency of the offense, getting firmer after a first warning: "I note that there's a problem in that you . . ." to, "This is the second warning about . . ." to, "I must warn you that any repetition of this situation will be cause for immediate dismissal."

Rumors

Weak Model

Subject: Percaarisus Permentol

After hearing several conversations at the convention last week, I became increasingly aware that some of you are trying to kill this product line before it ever catches hold. A nega-

tive attitude on your part will kill the promotion quicker than a defective product will.

This is an excellent product line, and we intend to get sales off dead center. Concentrated effort will mean some additional time in zeroing in on primary markets; but once you qualify your leads, you will begin to pick up additional customers and enjoy substantial commissions. If you need help in qualifying specific leads, contact Frank Bohon.

I want these rumors about product test results to cease, and I expect to see sales of this line on your next reports.

Don'ts

- Don't feel that you must trace the origin of a rumor or place blame for its spreading.
- Don't use an accusatory, watchdog tone when you intend to mend rumor damage; such a tone tends to cast a shadow on the truth or at least fuel further speculation.

Good Model

Subject: Percaarisus Permentol—Marketing Efforts

At the convention last week I heard some of you express concern over the marketability of our Percaarisus Permentol line. Let me clear up some misunderstandings: Our continued, concentrated research over the past 18 months shows this line, without a doubt, to be effective in treating the symptoms for which it was developed.

But I will acknowledge the difficulty you may have in selling such an innovative approach to treatment. To this end, let me remind you that we have test kits for you to offer the customer so that he can gather and examine results for himself. Please order and deliver these test kits; without them, you will have trouble in selling this product until more publicity has been done.

Concentrated effort will mean additional time zeroing in on primary markets; but once you qualify your leads, you will begin to pick up additional customers and enjoy substantial commissions. If you need help in qualifying specific leads, contact Frank Bohon.

Because a negative attitude always dimin-

DIANNA BOOHER

ishes your selling success, I hope that this will clear up any concerns you may have had about test results. I look forward to seeing sales of this new line on your next reports.

Dos

- State the rumor and the "correction" up front.
- Acknowledge tidbits of truth, from which almost all rumors have their origin. Such acknowledgment adds credibility to your explanations, corrections, or denials. In this memo, note that the writer acknowledges difficulty selling an innovative, unpublicized breakthrough that some may still consider unproven.
- If the rumor is damaging, emphasize the importance of "keeping the record straight."
- Be tactful about wording; no one likes to be considered a gossip or rumormonger. Notice the substitution of the word "concerns" for "rumors" in the example.
- End with a positive, business-as-usual closing.

Thank You's

Good Models

Subject: Thank You for June 14 Conference

Ms. Henley, thank you for giving me so much of your time last Monday afternoon and for your welcome advice on my career advancement.

I did follow up on both of your suggestions. Bob Holloway has asked me to come to work on his new project; I'll be assuming those new responsibilities after the first of the month. Also, I notified Training of my interest in the upcoming

computer course, and due to a last-minute cancellation, I am enrolled to attend next week.

Please know how much I appreciate your interest in my studies and career advancement.

Subject: Florida Hospitality

Harvey, just a note to say thank you for your hospitality while I was soaking up the sunny Southern atmosphere and doing my homework in learning to fine-tune a MOG system. Do tell your wife thanks for giving up her evening alone with you and joining us for Tuesday night's "fiesta."

Please let me repay the favor when you're out our way next fall; I know of a skeet-shooting range you would enjoy. If you let me know a day or two in advance, I'll make the arrangements.


Thanks again.

Dos

- State your "thank you" immediately as the primary reason for writing.
- Be specific in detailing the "whys" of your thankfulness. In other words, let the reader know that you understand and appreciate the efforts he put forth in your behalf.
- Mention the good results of the reader's information, advice, or project. What benefits did you or someone else derive? Omit any disastrous results that would detract from the thanks.
- Name names; thank individuals, not groups.

Dianna Booher is president of Booher Writing Consultants in Houston. Her article is adapted from Send Me a Memo, by Dianna Booher; © 1983 by Dianna Booher, reprinted by permission of Facts on File Inc., New York.

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Memorial Medical Center

TO: Administrative Officers
Members of the Medical/Dental Staff
Department Managers

FROM: Leslie Wellington-Minjarez, RN *Ymm*
Director of Medical/Surgical Services

DATE: July 25, 1990

RE: OFFICE & BEEPER NUMBER

My office is located on 4 West just past the nurse's station. I can be reached at extension 5212 or beeper #301. Please feel free to come by my office or page me if I can be of any assistance to you. I look forward to the opportunity to work with each of you in my role as director.


Thank you.

Isk



Memorial Medical Center

TO: STAFF PHYSICIANS AND PERSONNEL

FROM: DR. R. DEVASTHALI, RADIATION SAFETY OFFICER 

DATE: JULY 31, 1990

RE: RADIATION DOSIMETERS (FILM BADGES)

Please be advised that all personnel working in jobs which routinely require possible exposure to ionizing radiation must properly wear and maintain a radiation dosimeter. Staff working in the following areas are required to wear radiation film badges at all times:

1. IMAGING SERVICES: Excluding clerical staff.
2. OPERATING ROOM: All personnel.
3. CATH LAB: All personnel.

Staff physicians working in these areas when ionizing radiation is in use must also wear a film badge at all times.

Film badges should always be worn at waist level and be worn inside any lead aprons.

Ring badges or other radiation monitoring devices will be issued when a written request with justification is received and approved by the Radiation Safety Committee.

Please be aware that a film badge affords no protection and only measures radiation exposure after you have been exposed.

Radiation protection consists of three easily accomplished factors.

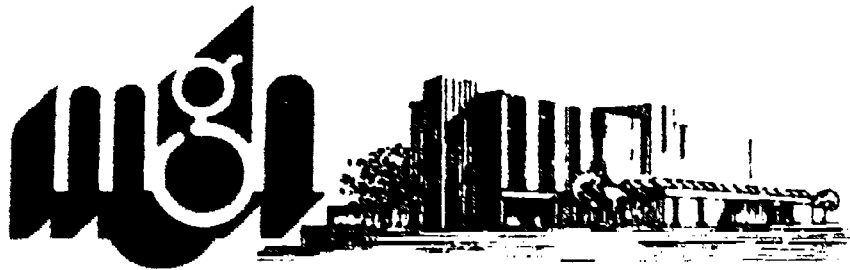
1. DISTANCE: Always stand as far from the radiation source as possible.
2. TIME: Keep exposure time to the absolute minimum. This includes using fluoroscopy in short intervals and if possible move away from the radiation source when not directly involved in the procedure.
3. PROTECTION: A lead apron must be worn at all times during a procedure, without exception!! A thyroid collar should be worn by physicians and staff in the immediate proximity of the X-ray source. Additional protective devices such as lead gloves, wrap-around aprons and eye protection should be worn when exposure is at a long duration or exposure to the primary beam may occur.

Radiation protection is everyone's business, if you have any questions or concerns please contact me or Michael Hajworonsky, in the Department of Imaging Services at extension 2227.

Thank you for your cooperation in making Memorial Medical Center a radiation safe work environment.



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MEMORIAL GENERAL HOSPITAL

Date: May 9, 1990

To: Sue Notham
Manager/Medical Records Department

From: Mary Jo Solon *MJS*
Director/Maternal Child Services

A new edition of the approved abbreviations and symbols booklet was distributed in March, 1990. This booklet was compiled by the medical records department and signed off by both the Chief of Staff and the Chairman of the Medical Records and Forms Committee.

Unfortunately, the list of revisions was not routed through the Nursing Division prior to publication. There are several commonly used abbreviations which were approved in the prior booklet that were not included in the new edition. In addition, there are abbreviations that Nursing would like to add.

The abbreviations in question are currently in use and so it is imperative that we revise this edition. I would be happy to take the issue to the Nursing Leadership group and to compile the list of changes that need to be made. If you need any clarification of this issue, please do not hesitate to call me.

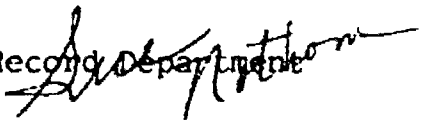
cc: Sylvia Frietze



Memorial Medical Center

July 13, 1990

MEMO TO: Jennifer Nelson, RN
Patient Care Coordinator/EE

FROM: Susan Nothom, ART
Manager, Medical Record Department 

RE: Trauma Abstracts

Yolanda Inman recently requested 300+ charts to review for trauma registry. She stated her deadline as mid-August 1990 (one month). Supplying her with these records in a timely manner, to assure that she meets her deadline, necessitates no less than 40 hours overtime for my staff.

If these lists could be provided to me monthly (i.e., provide prior month's list to me by the 15th of the following month), we could absorb this duty into our normal routine and alleviate the overtime expense. I am sure this system would enhance Yolanda's abstract completion as well.

Please consider my recommendation and let me know of your approval.
Thanks!

cc: Robert Abernethy, VP/Fiscal Services
Sylvia Frietze, VP/Patient Care Services
Yolanda Inman, RN, Trauma Registrar



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Memorial Medical Center

~~July 17,~~ 1990

MEMO TO: Medical Record Department Staff
FROM: Sue Nothom, Manager *Sue*
RE: Clarification Of Phone Coverage By Shift

FIRST SHIFT begins phone duty at 6:30 AM Sunday through Saturday;
ending at 6:00 PM Monday through Thursday and 3:00 PM
Friday and 2:30 PM Saturday through Sunday.

SECOND SHIFT begins phone duty at 6:00 PM Monday through Thursday and
3:00 PM Friday and 2:30 PM Saturday through Sunday; ending
at 11:00 PM Monday through Friday and 10:30 PM Saturday
through Sunday.

THIRD SHIFT begins phone duty at 11:00 PM Monday through Friday and
10:30 PM Saturday through Sunday; ending at 6:30 AM
Sunday through Saturday.

If you have any questions/concerns please see me.



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Memorial Medical Center

TO: All Department Managers and Supervisors

FROM: Dennis R. Picard
Vice President, Human Resources

DATE: August 14, 1990

SUBJECT: MMC's "STEP AHEAD" Project Commitment

When the grant proposal was submitted that resulted in the awarding of the STEP AHEAD grant to MMC and NMSU - Memorial Medical Center made a number of specific commitments. I would appreciate it if, in your leadership role, you would insure the fulfilling of the spirit and the intent of these commitments.

The commitments that effect you are:

1. We would actively encourage our staff's participation in programs that might be of benefit to them and / or the Medical Center.
2. That staff would be paid for all their time while they attended classes.

Other corporate commitments made by MMC are:

- 1 We would provide some of the printing support.
2. We would provide the classrooms.
3. We would provide meals / snacks, as appropriate, during classes, workshops, etc.
4. We would co-lead and share in the project coordination.

TO: **ACLS PARTICIPANTS**

FROM: Wanda Borges, RN, CEN, Course Coordinator

I look forward to your participation in this year's ACLS course scheduled for Oct. 17, 18, & 19. This provider course is sponsored by the American Heart Association, New Mexico Affiliate, and Memorial General Hospital. Certification in ACLS is dependent upon American Heart Association standards which include:

1. A minimum score of 80% on the written examination
2. Proficiency in the performance skills within the time allotment
3. Certification in Basic Life Support (CPR).

BASIC LIFE SUPPORT, (CPR) is part of the ACLS course--It is a **TESTING STATION!** Therefore, all ACLS candidates will be tested prior to ACLS weekend. (You may recert at this time.) You must attend *one* of the following:

Monday, Oct. 9, 1989	12:00 noon-4:00 pm	Conference Center
Tuesday, Oct. 10, 1989	8:00 am-12:00 noon	Conference Center
Wednesday, Oct. 11, 1989	11:00 am-3:00 pm	Conference Center
Thursday, Oct. 12, 1989	4:00 pm-8:00 pm	Conference Center
Friday, Oct. 13, 1989	9:00 am-1:00 pm	Conference Center

Remember, CPR is a Testing Station. All ACLS candidates will be expected to be thoroughly proficient in BLS skills without coaching. A limited time will be allowed to test out. You **MUST** arrive on time!!!

Pre-course preparation is strongly recommended. Course materials should be read prior to the course--Come prepared! Enclosed in your packet are one ACLS textbook, the ACLS algorithms, criteria sheets for teaching/testing and the course schedule. **YOU MUST BRING YOUR CRITERIA SHEETS TO THE COURSE IN ORDER TO PASS!!!**

The course schedule is enclosed for your reference. Please note that all lectures and teaching/testing stations will be held in the Educational Services Conference Center (West of the Hospital and North of the heli-pad), except for the written exam which will be held in Staff rooms A, B and C. Wear comfortable clothing (jeans, shorts, etc.). Breaktime snacks will be provided, lunches will be on your own. Plan to arrive on time, (I repeat ON TIME) as we will be staying on schedule.

If you have any questions prior to the course, please call me at 521-2233, ext. 3667.

**ATTENTION:
ALL PARTICIPANTS SIGNED UP
FOR THE MAY 19, 20 AND 21 ACLS
COURSE (NEXT WEEK!) PLEASE MAKE
SURE THAT YOU ARE PLANNING TO
ATTEND THE STATION I BLS TESTING
STATION. THEY ARE SCHEDULED FOR
MONDAY MAY 15: 0800-1000,
TUESDAY MAY 16: 1200-1400,
WEDNESDAY MAY 17: 1530-1730.
IF YOU FAIL TO COMPLY WITH THIS
MANDATORY STATION YOU WILL
NOT BE ELIGIBLE FOR THE CLASS!!!**

To: ACLS Instructors
From: Wanda Borges, RN
ACLS Coordinator
Date: September 20, 1989
RE: ACLS Schedule

The schedule for the upcoming ACLS course in Las Cruces is enclosed. A reminder, the course dates are: October 17, 18 and 19. Thank you for participating in *another* ACLS course this year. I know it will be great.

Please note the lecture/skills stations that you are scheduled to teach. I tried to coordinate this course so no one instructor would be too greatly inconvenienced. If you have any concerns or questions about your assignment, please let me know as soon as possible. If I don't hear from you by October 2, I will assume that your assignment is acceptable. We will have a pre-course meeting October 12, 12:00-1:00 pm at the educational services conference center to discuss mega-code scenarios and other areas of possible confusion. Please plan to attend if at all possible.

Please note below the BLS Station I dates and times. As you know, American Heart Association now requires that ACLS instructors assist with BLS instruction/testing 2 hours per year. Please contact me by October 2 if you will be able to assist with a BLS station.

BLS STATION I:	Monday, Oct. 9, 1989	12:00 noon-4:00 pm
	Tuesday, Oct. 10, 1989	8:00 am-12:00 noon
	Wednesday, Oct. 11, 1989	11:00 am-3:00 pm
	Thursday, Oct. 12, 1989	4:00 pm-8:00 pm
	Friday, Oct. 13, 1989	9:00 am-1:00 pm

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Again, thank you for your time and interest. I look forward to teaching with you. If you have any questions regarding the new ACLS instructor requirements a copy is available in education. Please contact me for any questions or concerns at 521-2233 or Ext. 3667.



Memorial Medical Center

Carter Campbell (M) N
Manager NN
Educational Services - 17

To:

From: Carter Campbell, Manager
Educational Services

Date July 17, 1990

Subject: Documentation of Staff Development and Hazardous Material Training.

The JCAHO requires continuing education of the health care team and that team members attendance is clearly documented.

Through July and August the Educational Services Department will be conducting a survey of the Staff development record keeping system so that you know the status of your department before the end of the calendar year.

Please match the attached report of your staffs attendance with the "Staff Development Record" slips in your book (be sure to take credit for your unit specific in, service and outside educational activities).

We will contact you for an appointment (about 15 min. of your time) to answer any questions you may have regarding JCAHO requirements or the Staff Development Documentation system at MMC.

Please note the Infection Control and Hazardous Materials section of the Survey. We realize that these two items on the survey will not be complete however we would like to be able to account for these areas when we repeat this survey for 1990 during the complete Audit in January 1991.

So that we may stay on our time schedule, please complete the attached form and return it to Educational Services as soon as possible.

We greatly appreciate your assistance in this matter.

CC. President & Vice Presidents



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Memorial Medical Center

AMBULANCE DEPARTMENT ANNUAL SAFETY ACTIVITY REPORT August 9, 1990

EQUIPMENT MANAGEMENT REPORT FAILURE AND USER ERRORS

The following vehicle or equipment failures and the appropriate corrective actions were reported to the Hospital's Quality Assurance Committee.

VEHICLES

- REPORTED** Five ambulance electrical system failures were investigated for preventable cause. Failures were attributed to the wrong alternator pulley drive belt being installed.
- ACTION TAKEN** The proper drive belts were installed on the vehicles and the preventive maintenance cycle was reduced to 14 days. The problem has been resolved.
- REPORTED** The rear door latch failed on one of the new ambulances while personnel were attempting to remove a patient at the hospital. A nut and washer had come off of the latch and rendered it inoperable.
- ACTION TAKEN** All vehicles were examined for a similar condition to prevent a reoccurrence. Problem resolved.
- REPORTED** On two occasions brake boost/power steering belts failed in operation. Neither failure resulted in detrimental patient outcome.
- ACTION TAKEN** Discussed with City maintenance staff. They indicated that routine preventive maintenance should correct problems in future.
- EQUIPMENT**
- REPORTED** A significant number of long backboard failures occurred while patients were being moved.
- ACTION TAKEN** A different manufacturer and board style was selected to replace existing stock. Problem resolved.

Business	VPU	VPU	VPU	VPU	VPU	VPU	VPU	VPU	VPU
	V/E	INDOB	ABLE	URO					
Oxygen									
MAST <input type="checkbox"/> Legs <input type="checkbox"/> Abdom.									
IV Site <input checked="" type="checkbox"/> R <input checked="" type="checkbox"/> L <input type="checkbox"/> Arm <input type="checkbox"/> Other	LACTATED RINGERS					IV GAUGE: 14 GA		Total Volume: 1000cc	
50 W Narcan									
Defibrillation (Watt/Sec)									

GLASGOW COMA SCALE TOTAL

TRAUMA SCORE TOTAL

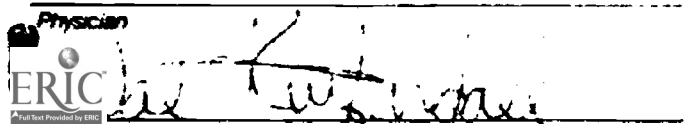
NARRATIVE:

To include: Patient identification, chief complaint, current history, physical examination, past medical history, medical communication, treatment and outcome.

TRANSPORTED A 40YOM PT. PT. C/O 2 GUNSHOT WOUNDS. PT. WAS INVOLVED IN A ARGUMENT WITH HIS BROTHER IN-LAW WHEN HE WAS SHOT ONCE IN HIS (L) LEG & ONCE IN HIS (R) LEG. U/A FOUND PT. LAYING ON THE SIDE OF A HOUSE. PT. WAS A/O X 3. PT. WAS ETOH. PT. HAD BEEN SHOT IN R WITH A .22 CALIBRE RIFLE. PT. HAD AN ENTRANCE WOUND APPROX. MID-THIGH ON HIS (R) LEG WITH NO EXIT WOUND. PT. HAD ANOTHER ~~ENTRANCE~~ ENTRANCE WOUND ON THE BACK OF HIS (L) CALF WITH NO EXIT WOUND. FIRST-RESPONDERS STATED PULSE OF 80 B/P OF 160/P. WHEN PT. WAS LOADED INTO 2182 NEITHER PULSE OR B/P WAS PALPABLE. PT REMAINED A/O X 3 THROUGHOUT TRANSPORT. PT. WAS BOLUSED 700 ML OF LR AFTER WHICH, A WEAK PULSE WAS PALPABLE. BOTH WOUNDS WERE BANDAGED WITH 4x4's. NO SIGNIFICANT BLEEDING ENROUTE. ON SCENE, PT LOST APPROX. 200-300cc OF BLOOD. AN IV OF LR WAS STARTED IN PT'S (L) A/C WITH A 14GA ANGIO. PT. REFUSED 2ND LINE O₂. PT. WAS IN EXTREME PAIN THROUGHOUT TRANSPORT. PT. WAS TRANSPORTED TO MMC C-3.

BEST COPY AVAILABLE


REFUSAL of SERVICE: I have been told, and understand that I am in need of evaluation, treatment and/or transportation to a hospital, and of my own free will, and against advice given, acknowledge MY REFUSAL of such help.

Physician

 ERIC
 Crew Signature

94934 83

Signature _____

Witness _____

SECTION: TWENTY-SIX	PAGE <u>1</u>
SUBJECT PROFESSIONAL DEVELOPMENT AND CONTINUING EDUCATION ASSISTANCE	OF <u>2</u>
APPROVED  ADMINISTRATOR	DATE: REV: 1/1/82 4/1/84 3/1/86 6/1/88

I. PURPOSE

To provide a continuing education program for professional development which will benefit MGH and advance quality patient care.

II. WHO

Full-time and part-time MGHers classified as 32 hour-a-week or more.

III. POLICY

- A. To reimburse MGHers for a percentage of the tuition expense for approved courses of study that are completed per this policy.
- B. The course(s), as well as the college, university, or school offering the course(s), must be approved by the Personnel Manager and the Department Manager.

IV. GUIDELINES

- A. An MGHer desiring to participate in this program must notify the Personnel Department no later than thirty days after the start of the semester.

This will allow the applicant to know if their course(s) are approved. The Department Manager and the Personnel Manager will review and sign (if approved) the application ensuring it complies with the spirit and intent of this program.

- B. Enrollment in the Professional Development Continuing Education Assistance Program is Completed when a copy of the approved Enrollment Notification Form is returned to the MGHer, with the Personnel Manager's and the Department Manager's signatures.
- C. An official payment receipt should be delivered to the Personnel Department within thirty (30) days after the start of school.
- D. Only payments of tuition and laboratory fees are subject to this reimbursement policy.

BEST COPY AVAILABLE

SECTION: TWENTY-SIX

PAGE 2

SUBJECT: PROFESSIONAL DEVELOPMENT AND CONTINUING EDUCATION ASSISTANCE

OF 2

- E. The MGHer must be a full-time or an eligible part-time employee during the entire term of the course and for thirty (30) days after its completion. The tuition reimbursement check is processed 30 days after the course ends if the participating MGHer has previously submitted their final grades and is still eligible.
- F. Approved challenge exams and approved courses offered by the Las Cruces Public School System and the Dona Ana Branch of NMSU will be reimbursed 100%, subject to the overall maximum.
- * G. Reimbursement for approved courses will be a percentage of the tuition paid. To qualify for reimbursement, undergraduate and graduate courses must be completed with a grade of "C", or its equivalent.
- * 1. Eligible, full-time, and part-time MGHer will receive:
- 60% reimbursement for an undergraduate or graduate school final course grade of "C" or better.
 - up to \$200 per semester, and a maximum of \$600 per calendar year.
- H. Approved courses must have a direct relationship to present or probable future positions at Memorial General Hospital.
- I. Tuition assistance from other sources, including the G.I. Bill, will reduce Memorial General Hospital's participation dollar for dollar. The program application form requires the applicant to list all sources and amounts of other school-related financial aid.

V. FURTHER ASSISTANCE

Personnel Manager

Name of Employee

Title

Prepared by (Signature) Title

Relationship to Employee Period Covered by this Evaluation
Mo. Day Yr.
Immediate Supervisor From: / /
To: / /
Other (Explain) Date Prepared: _____

1.
JOE KNOWLEDGE AND SKILLS

- _____ A. Has a general knowledge of the general occupational field.
- _____ B. Experience and knowledge gained for a specific job.
- _____ C. Skills as applicable to the job description.

(In narrative, describe fields of special competence and, as appropriate, comment on developmental progress and needs in current job.)

COMMENT:

2.
JUDGMENT AND PROBLEM SOLVING

- _____ A. Gets to the root of the problem and makes sound recommendations.
- _____ B. Foresees probable consequences of actions or recommendations.
- _____ C. Can analyze situations, determine issues, gather sufficient facts, weigh alternatives, and arrive at useful conclusions, for making recommendations.
- _____ D. Recognizes situations that supervisor should be consulted on or informed of.

COMMENT:

3.
RESPONSIBILITY AND INDEPENDENCE

- _____ A. Can work with success independently.
- _____ B. Carries out assignments and follows through.
- _____ C. Understands opposing views or obstacles when assigned tasks.
- _____ D. Sees that necessary things get done.
- _____ E. Can be depended upon, in terms of presence on the job, punctuality, effective use of time.
- _____ F. Accepts responsibility.

COMMENT:

4.
COMMUNICATIVE SKILLS

- _____ A. Speaks well: Organization of ideas, adapting to the listener and situation, clarity of expression.
- _____ B. Writes well: Writing is clear, correct, well organized, complete, appropriate.

COMMENT:

5.
WORKING RELATIONSHIPS

- _____ A. Within the department, gets along with co-workers, is a good group worker, considers other points of view.
- _____ B. Outside the department, earns respect and cooperation of peers, management officials in other departments or other agencies or the general public.
- _____ C. Understands and respects the feelings of co-workers, patients and others.

COMMENT:

ADAPTABILITY AND CREATIVITY

- _____ A. Adapts readily to changes in program direction or in procedures.
- _____ B. Displays creativity and originality in attaining work objectives.
- _____ C. Gives an extra portion when the job requires.
- _____ D. Seeks self improvement and professional growth.

COMMENT:

7.
EQUIPMENT AND SUPPLIES

- _____ A. Uses medical center equipment and supplies safely and economically.
- _____ B. Has knowledge of equipment used.

COMMENT:

8.
SAFETY

- _____ A. Demonstrates safe work habits.
- _____ B. Knows and adheres to the medical center safety procedures.
- _____ C. Is alert to safety hazards and takes initiative in getting them corrected.

COMMENT: