

Formatting Hardcopy Letters and Memos

Learning Objectives

After reading and applying the information in Module 6, you'll be able to demonstrate

Knowledge of

LO 1 The basic design formula: form follows function

LO 2 How to use PAIBOC to decide on your format

LO 3 Basic business formats

Skills to

LO 4 Use PAIBOC to choose appropriate formats

LO 5 Use non-sexist courtesy titles

LO 6 Create an appropriate business image

MODULE OUTLINE

- ✗ How should I set up letters?
- ✗ What courtesy titles should I use?
- ✗ How should I set up hardcopy memos?

Module Summary

Assignments for Module 6

Polishing Your Prose: Making Pronouns Agree with Their Nouns





Employability Skills 2000+ Checklist

Module content builds these Conference Board of Canada Employability Skills 2000+

Communicate

Think and Solve Problems

Manage Information

Participate in Projects and Tasks

LO1 Business letters, memos, and emails are similar in formality, length, style, and organization. **Letters** go to people outside the organization, whereas **memos** are messages sent to people within your organization. Because they have different **audiences**, letters and memos differ in format, signalling readers that they are getting an external or internal message.

Format includes the parts of a document and the way they are arranged on the page. Short reports use letter or memo format (Modules 16 and 17). Long reports can use the format described in Module 18. If your organization has its own formats for letters and memos, use them. Otherwise, choose one of the formats in this module.



When you are considering how best to deliver your message, remember the principle of all good design: *form follows function*. This design principle is essential to communication success: when you shape your message (format) to meet the needs of your audience and your purposes (function), you get the results you want.

Use PAIBOC analysis (Figure 6.1) to choose the right format and medium for your message.

LO3 How Should I Set Up Letters?

Letters are written in block and modified block.

The two most common letter formats are block, sometimes called **full block**, and **modified block** or **semi-block**.

FIGURE 6.1 PAIBOC Questions for Analysis

LO2
LO4

- P** What is the **purpose** of your communication? What do you hope to achieve? What results do you want?
- A** Who is your **audience**? Are they inside or outside your organization? What are their expectations? What do they care about? What do they value? What do they know? What do they need to know? How will they feel about your message? How does your audience expect to receive messages—hard copy or electronic? Is texting acceptable for your purpose, the audience, and the content of the message?
- I** Based on your purpose and audience analysis, what **information** must your message include?
- B** Based on your purpose and audience analysis, what **benefits** can you use to meet your audience's needs and achieve your purpose?
- O** Based on your audience and purpose analysis, what **objections** can you expect from your audience? What negative aspects of your message must you de-emphasize, or overcome?
- C** How does the **context** affect audience response? What circumstances—economic, environmental, legal, and/or organizational—might influence how your audience will perceive the message?

FIGURE 6.2 Block Format on Letterhead (mixed punctuation, collection letter)

158 Woodborough Way NW Edmonton,
AB T5Y 1N2 780.878.3445.1.877.233.2334

GameRoom Warehouse

October 4, 2013

James E. Murphy
Accounts Payable
Gomes Inc.
560 Wasatch Boulevard
Red River, MB R9H 6A9

Dear Jim:

Thank you for your recent order. You will receive the shipment of 2000 X-Men games by the end of the week.

Meanwhile, Jim, we have not yet received payment for the shipments of Noble Combat (invoice #01R-784391) and Boom (invoice #01R-784392), sent September 10, 2012.

Please send a cheque for \$2300.00 to cover these items and bring your account up to date.

Sincerely,
Omair Firenzo

Omair Firenzo
Credit Representative

cc: Juan Ye, Credit Manager

Line up everything at left margin

Use first name in salutation if you would use it on the phone

Complimentary close

2-6 spaces, depending on length of letter

2-3 spaces

3-4 spaces

How Are the Two Formats Similar?

Block and modified-block business letters share many elements:

- Organizations include their return address in their **letterhead**.
- Written documentation is for the record, so the **date** is essential.
- Readers are addressed by name in the **salutation**.
- Subject and reference lines direct readers' attention to your purpose.
- A standard **complimentary close** (*Sincerely*, *Best*, *Regards*) comes before your signature.
- Correct punctuation is essential for credibility.
- Continuation (subsequent) pages maintain coherence.
- "Enclosure" tells the reader that you have included additional material, like a duplicated document or a resumé.

Choose the level of formality in the **salutation** based on your relationship with the person: *Dear Ahmed* if you're on a first-name basis and *Dear Mr. Guten* if you don't know the reader well enough to use a first name. When you are responding to a letter or memo, use a salutation that mirrors the original sender's signature, which reflects how the person wants to be addressed.

Sincerely, *Cordially*, and *Regards* are standard complimentary closes.

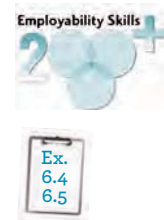
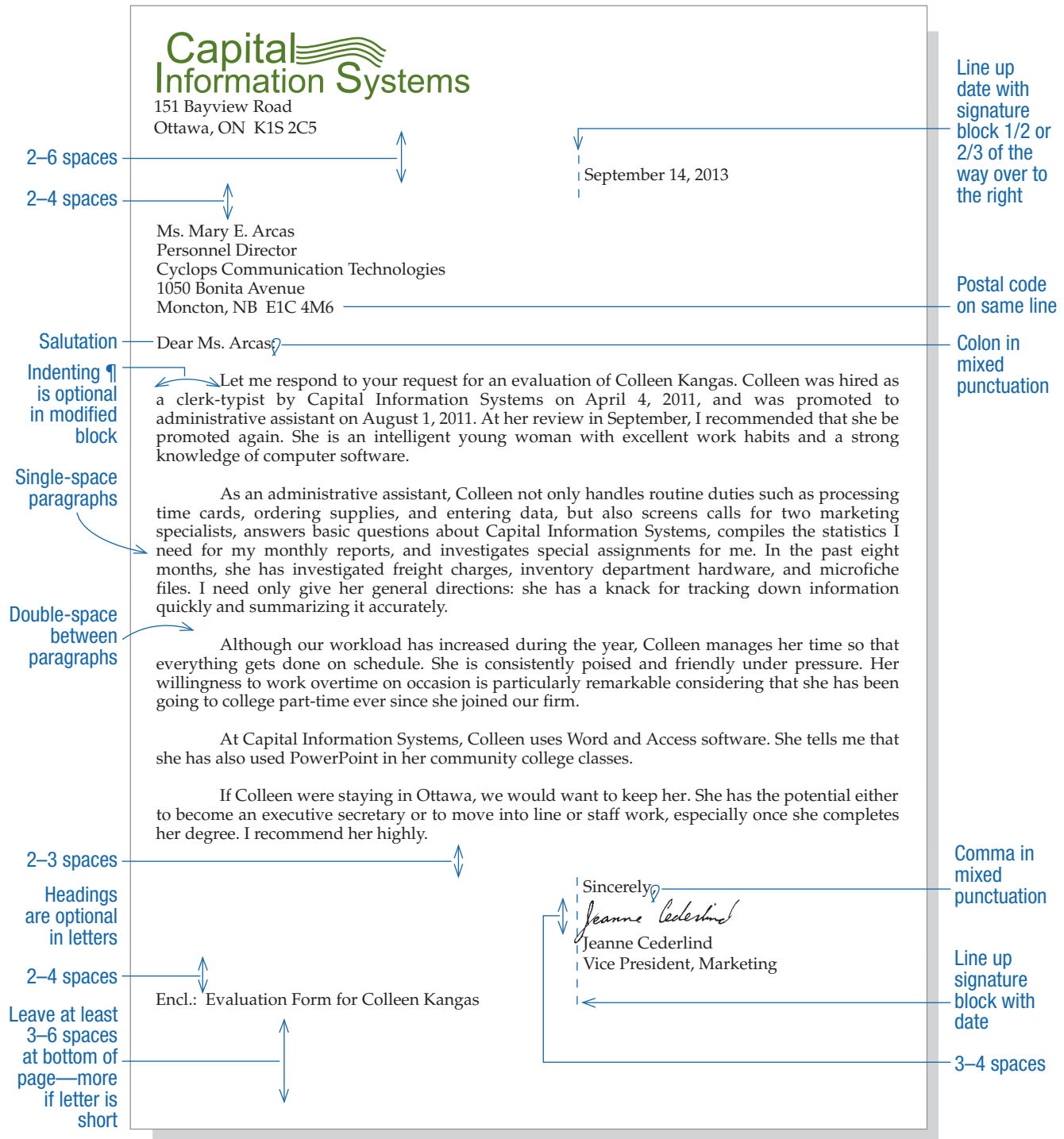


FIGURE 6.3 Indented Format on Letterhead (mixed punctuation, employee evaluation letter)



In two-point or **mixed punctuation**, a colon follows the salutation and a comma follows the close. Today, many people use a comma after the salutation to make the letter look more personal.

In **open punctuation**, omit all punctuation after the salutation and the close. A few organizations use open punctuation because it's faster to type.

How Do I Use Subject Lines?

A **subject line** tells readers what they are about to read. Subject lines are required in hardcopy memos, and all emails; however, they are optional in letters. Use a subject line in your hardcopy and electronic letters when you want to focus the audience's attention on specific content in the message.

Good subject lines are specific, concise, and appropriate for your purposes and the response you expect from your reader:

- When you have good news, put it in the subject line. (Module 8)
- When your information is neutral, summarize it concisely in the subject line. (Module 8)
- When your information is negative, use a negative subject line. (Module 9)
 - if the reader may not read the message
 - the reader needs the information to act
 - if the negative is your error
- When you have a request that will be easy for the reader to grant, put either the subject of the request or a direct question in the subject line.
- When you must persuade a reluctant reader, use common ground, a reader benefit, or a directed subject line (Module 10) that makes your position clear.

Modules 7 to 9 cover subject lines in detail.

When you do use a subject line in your letter

1. Write it last, so that it covers the message or explicit content to suit your purpose and meet the audience's needs.
2. Place it after the salutation.

A **reference line** refers the reader to the number used on previous correspondence, or the order or invoice number that this letter is about. Government organizations, such as Revenue Canada, use numbers on every piece of correspondence they send out, so they can quickly find the earlier document to which an incoming letter refers.

Both block and modified block formats use headings, lists, and indented sections (known as *telegraphing*, *highlighting*, *bulleting*, or *dot jotting*) for emphasis.

Each format has advantages. Block is the format most frequently used for business letters; readers expect it and it can be typed quickly, since everything lines up at the left margin. Speed-readers say it is easier to read. *Modified* block format creates a visually attractive page by moving the date and signature block into what would otherwise be empty white space. Table 6.1 compares the two formats.

TABLE 6.1 Differences Between Letter Formats

	Block	Modified Block
Date and signature block	Lined up at left margin	Lined up 1/2 or 2/3 over to the right
Paragraph indentation	None	Optional
Subject line	Optional	Rare

Letterhead is pre-printed stationery with the organization's name, logo, address, and phone number. Figure 6.4 shows how to set up modified block format without letterhead. You can also use block format without letterhead.



What If My Letter Is More Than a Page?

When your letter runs two or more pages, use a heading on the second page to identify it. Putting the reader's name helps the writer, who may be printing out many letters at a time, to make sure the right second page gets in the envelope.

Reader's Name
Date
Page Number

or

Reader's Name	Page Number	Date
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When a letter runs to two or more pages, use the letterhead only for page 1. (See Figure 6.5) For the remaining pages, use plain paper that matches your first page in weight, texture, and colour.

How Do I Show I Am Sending Additional Documents?

Many letters are accompanied by other documents. Whatever these documents may be—a multi-page report or a two-line note—in hardcopy letters, they are called **enclosures**, since they are enclosed in the envelope. The writer should refer to the enclosures in the body of the letter: “As you can see from my resumé...” The enclosure line is usually abbreviated: *Encl.* (see Figure 6.5). The abbreviation reminds the person who seals the letter to include the enclosure(s).

FIGURE 6.4 Modified Block Letter (open punctuation, subject line)

	1148 Brussels Ave. NE Timmons, ON P4N 2S9 February 12, 2013
Sales Department Custom Accessories Corporation 2020 104 St. NW Edmonton, AB T5A 1B0	
Attention Sales: Subject: Invoice No. 664907, 10/29/13	
I ordered and received the briefcase on page 14 of your online catalogue (881-CD-L-9Q-4.) The catalogue offered the Leatherizer, 881-P-4, free with the purchase of the briefcase. On the order form, I indicated that I wanted the Leatherizer and checked the “Free” box, as required. However, you have charged my credit card for the Leatherizer, plus HST.	
Please refund my credit card the \$6.99 charge for the Leatherizer, plus additional HST, and confirm when you have done so.	
	Sincerely, <i>Carolyn Lehman</i> Carolyn Lehman



A Question of Ethics

You work for a national retail pharmacy chain. You receive a memo from your supervisor instructing you to post a sign at the cash counter advertising an in-store cosmetic special. The memo and sign contain multiple grammar and spelling errors.

What should you do? Is this an ethical issue? Why or why not?

When Do I Show I Am Sending Copies of My Messages to Other People?

Sometimes you write to one person and send copies of your letter to other people. To let the reader know that other people are getting copies, list their names on the last page. The abbreviation *cc* originally meant “carbon copy” but now means “computer copy.” Other acceptable abbreviations include *pc* for “photocopy” or simply *c* for “copy.”

You can also send copies to other people without telling the reader. These **blind copies** are not mentioned on the original; they are listed on the copy that you save for the organization’s file, with the abbreviation *bcc* preceding the names of people getting these copies.

Saving a copy of a message for your own files is standard business practice. However, sending blind copies of your messages to other people is not. Module 7 discusses the ethical concerns of blind copying your electronic messages to others.

LO5 What Courtesy Titles Should I Use?

Research your reader’s preference.

Today, most salutations use “Dear *first name last name*.” Using *Dear* is a courteous, standard business convention and in no way implies a personal relationship with the recipient.

Some people and many cultures prefer their professional titles: Director Chadraha, President Mauricio. Use *Ms.*, *Mr.*, or *Mrs.* when your audience has signed his or her correspondence that way.

1. Use professional titles when they’re relevant.

Dr. Kristen Sorenson is our new company physician.
The Rev. Robert Townsley gave the invocation.

2. If a woman prefers to be addressed as *Mrs.* or *Miss*, rather than *Ms.*, use the title she prefers. You-attitude (Module 13) takes precedence over non-sexist language: address the reader as she—or he—prefers to be addressed. To find out whether a woman prefers a traditional title:
 - a. Check the signature block in previous correspondence. If a woman types her name as (*Miss*) *Elaine Anderson* or (*Mrs.*) *Kay Royster*, use the title she designates.
 - b. Notice the title a woman uses in introducing herself on the phone. If she says, “This is Robin Stine,” use *Dear Robin Stine* when you write to her. If she says, “I’m Mrs. Stine,” use the title she specifies.
 - c. Check your company directory. In some organizations, women who prefer traditional titles list them with their names.
 - d. When you’re writing job letters or other crucial correspondence, call the company and ask the receptionist which title your reader prefers.

Ms. is particularly useful when you do not know a woman’s marital status. However, when you know that a woman is married or single, use courtesy titles only when your audience requests them.

In addition to using parallel courtesy titles, use parallel forms for names (Table 6.2).



FIGURE 6.5 Two-Page Letter, Block Format (mixed or two-point punctuation; informative)

45226 Bernard Avenue
Chilliwack, BC V2P 1H1
Adrienne@hotmail.ca

May 4, 2013

Stephanie Voight
Director
Corporate Communications
Spincity Incorporated
715 2nd Avenue East
Moose Jaw, SK S9X 1G9

Dear Stephanie Voight,

Thank you for your prompt response to my inquiry about co-op opportunities at Spincity. My academic qualifications and previous work experience meet the criteria you designated in your letter.

Academic Qualifications

I have only one semester remaining in the Honours Media and Communications program at Simon Fraser University. Our rigorous curriculum includes Writing for Publication,

Stephanie Voight

My B.A., Journalism from the University of Western Ontario allowed me direct entry into the fourth year of the program.

Work Experience

For the past three summers I have worked in the public relations department of Chang Design Solutions, writing ad copy and creating media relations kits for this design firm. As special events coordinator I was responsible for the company's grand opening, attended by 300 retail managers from Canada, the Northwestern United States and Hong Kong. I have additional, related experience that I would be happy to discuss with you in person.

Enclosed you will find my most recent grades transcript and press clippings from the Chang Design Solutions opening gala.

Please call me at (604) 555-5445, to arrange a meeting time at your convenience.

Sincerely,

Adrienne Lee
Adrienne Lee

Encl.: Transcript, press releases

2 May 4, 2013

Annotations:

- 2-6 spaces (between address and date)
- 2-3 spaces (between recipient name and address)
- Indenting paragraphs is optional in modified block (pointing to first paragraph)
- Plain paper for page 2 (pointing to second page)
- 1/2"-1" or 1.25 cm-2.5 cm (margin on second page)
- Reader's name (pointing to Stephanie Voight)
- Triple-space before each new heading (pointing to Work Experience)
- Bold headings (pointing to Work Experience)
- Use same margins as p. 1 (pointing to second page)
- Comma in mixed punctuation (pointing to Sincerely,)
- 3-4 spaces (between sign-off and name)
- 2-4 spaces (between name and enclosure)
- Colon in mixed punctuation (pointing to Dear Stephanie Voight,)
- Centre (pointing to date on second page)
- Also OK to line up page number date at left under reader's name (pointing to date on second page)

TABLE 6.2 Use Parallel Forms for Names

Not Parallel	Parallel
Members of the committee will be Mr. Jones, Mr. Yacone, and Lisa	Members of the committee will be Mr. Jones, Mr. Yacone, and Ms. Melton
	or
	Members of the committee will be Irving, Ted, and Lisa

When You Know the Reader's Name but Not the Gender

Never assume a person's gender by his/her name. When you know your reader's name but not the gender, you can do two things:

1. Call the company and ask the receptionist.
2. Use the reader's full name in the salutation.

Dear Chris Crowell:

Dear J. C. Meath:

When You Know Neither the Reader's Name nor Gender

When you know neither the reader's name nor gender, you have four options:

1. Use an attention line:

Attention Customer Service:

Attention Human Resources:

2. Use the reader's position or job title:

Dear Loan Officer:

Attention Registrar:

3. Use a general group to which your reader belongs:

Dear Investor:

Attention Admissions Committee:

4. Omit the salutation and use a subject line in its place:

Subject: Recommendation for Ben Wandell

Using bolded attention and subject lines is acceptable.

LO3 How Should I Set Up Hardcopy Memos?

The standard memo uses block format but has no salutation, close, or signature.

Hardcopy and electronic memos are messages sent **within** an organization.



LO1 FIGURE 6.6 Simple Request Memo

May 4, 2013
To: Noushad
From: Shantel *SW*
Subject: Forgotten Password
Please accept my apologies: I have forgotten my new password to get into client files. Please reset, and call me (extension 5340) with the temporary password.
Thank you, Noushad.

LO1 FIGURE 6.7 Memo Format (analytical proposal/short report)

Everything lined up at left

2-4 spaces

Double-space

No heading for ¶ 1

Triple-space before each new heading

Single-space paragraphs; double-space between paragraphs

Triple-space

Paragraphs left justified

No signature

Plain paper

Line up

Writer's initials added in ink

Capitalize first letter of each major word in subject line

Bold headings

Capitalize first letter of each major word of heading

October 8, 2013

To: Annette T. Califero

From: Kyle B. Abrams *KBA*

Subject: A Low-Cost Way to Reduce Energy Use

As you requested, I've investigated low-cost ways to reduce our energy use. Reducing the building temperature on weekends is a change that we could make immediately, that would cost nothing, and that would cut our energy use by about 6 percent.

The Energy Savings from a Lower Weekend Temperature

Lowering the temperature from 20°C to 15.5°C from 8 p.m. Friday evening to 4 a.m. Monday morning could cut our total consumption by 6 percent. It is not feasible to lower the temperature on weeknights because many staff members work late; the cleaning crew is also on duty from 6 p.m. to midnight. Turning the temperature down for only four hours would not result in a significant saving.

Turning the heat back up at 4 a.m. on Mondays will allow the building temperature to be back to 20°C by 9 a.m. Our furnace already has computerized controls that can be set to automatically lower and raise the temperature.

How a Lower Temperature Would Affect Employees

A survey of employees shows that only seven people use the building every weekend or almost every weekend. Eighteen percent of our staff have worked at least one weekend day in the last two months; 52 percent say they "occasionally" come in on weekends.

People who come in for an hour or less on weekends could cope with the lower temperature just by wearing warm clothes. However, most people would find 15.5°C too cool for extended work. Employees who work regularly on weekends might want to install space heaters.

Action Needed to Implement the Change

Would you also like me to check into the cost of buying a dozen portable space heaters? Providing them would allow us to choose units that our wiring can handle and would be a nice gesture toward employees who give up their weekends to work. I could have a report to you in two weeks.

We can begin saving energy immediately. Just authorize the lower temperature, and I'll see that the controls are reset for this weekend.

Hardcopy memos

- Omit the salutation and the close
- Use left justification
- Require subject lines

The simple request memo in Figure 6.6 uses a standard format.

FIGURE 6.8 Memo Format (memo letterhead, good news)

**Kimball,
Walls, and
Morganstern**

Date: March 15, 2013
To: Annette T. Califero
From: Kyle B. Abrams *KBA*
Subject: The Effectiveness of Reducing Building Temperatures on Weekends

Reducing the building temperature to 20°C on weekends has cut energy use by 4 percent compared to last year's use from December to February and has saved our firm \$22 000.

This saving is particularly remarkable when you consider that this winter has been colder than last year's, so more heat would have been needed to maintain the same temperature.

Fewer people have worked weekends during the past three months than during the preceding three months, but snow and bad driving conditions may have had more to do with keeping people home than the fear of being cold. Five of the 12 space heaters we bought have been checked out on an average weekend. On one weekend, all 12 were in use, and some people shared their offices so that everyone could be in a room with a space heater.

Fully 92 percent of our employees support the lower temperature. I recommend that we continue turning down the heat on weekends through the remainder of the heating season and that we resume the practice when the heat is turned on next fall.

Line up horizontally with printed Date/To/From/Subject

Margin lined up with items in To/From/Subject block to save typing time

Writer's initials added in ink

Capitalize first letter of each major word in subject line

Triple-space

Figures 6.7 and 6.8 illustrate the standard memo format. Note that the first letters of the reader's name, the writer's name, and the subject phrase are lined up vertically. Note also that memos are usually initialed beside the *To/From* block. Initialling tells the reader that the memo's writer takes responsibility for the document.

Some organizations have special letterhead for hardcopy memos, with the *Date/To/From/Subject* already printed on the form (see Figure 6.8).

Checkpoint

Letters are business messages written to readers outside the company. Letters use **block** or **modified semi-block** format.

Memos are business messages sent between people in the same company. Memos begin with a **Date** line, a **To** line, a **From** line, and a **Subject** line.



If the memo is long, consider breaking the text up with headings (Module 5, Modules 16 and 17) (see Figure 6.7). Designing and formatting your messages so that it's easy for your audience to read, understand, and respond makes it much more likely that they will.

LO6 EXPANDING A CRITICAL SKILL

Creating a Business Image

The way you and your documents look affects the way people respond to you and to them. All discourse communities and organizations (Module 2) have a dress code. One young man was upset when an older man told him he should wear better shoes. He was wearing leather shoes but not the kind that said "I'm promotable" in that workplace. Dress codes are rarely spelled out; the older worker was doing the young man a favour by being direct.

If you have a mentor in the organization, ask him or her if there are other ways you can make your appearance even more professional. If you don't have a mentor, look at the people who rank above you. Notice clothing, jewellery, and hairstyles. If you're on a budget, go to stores that sell expensive clothing to check the kind of buttons, the texture and colours of fabric, the width of lapels and belts. Then go to stores in your price range and choose garments that imitate the details of expensive clothing.

Some urban, multicultural workplaces welcome clothing choices that reflect a person's ethnic background and/or religious beliefs, and accept personal artifacts, including tattoos and piercing. However, such choices may evoke



The dress codes of some organizations are less formal than those of others.

negative assumptions; it's up to you to research the apparel choices considered appropriately professional in your organization.

MODULE SUMMARY

- Letters are written to people outside the organization; memos are documents written to people inside your organization.
- Block and modified block are the two standard letter formats.
- Use the courtesy titles people prefer. If you don't know a person's gender or title preference, ask.
- In a list of several people, use parallel forms for names. Use courtesy titles and last names for everyone, or use first names for everyone.
- Traditional hardcopy memos omit both the salutation and the close. Memos never indent paragraphs. Memos require subject lines; headings are optional. Each heading must cover all the information until the next paragraph. Never use a separate heading for the first paragraph.

ASSIGNMENTS FOR MODULE 6

Questions for Critical Thinking

- 6.1** Since everybody uses email now, why should you learn about hard copy letters and memos?
- 6.2** Word offers dozens of templates for business documents. How would you decide what template to use? What are the advantages of using Word templates? What are the disadvantages?
- 6.3** How do you decide how to address your recipient when you write?

Exercises and Problems

6.4 Formatting a Message

Correct the format errors in the following hardcopy memo.

March 3,2013

To: Professor Hughes
From: Adele Cameron
Subject: My Writing Progress

Overview

Dear Professor Hughes. Thank you for the opportunity to review my writing progress so far. Because I have been using a reader to provide specific feedback, my writing has improved since the beginning of the semester.

Writing Strategies

When you encouraged us to find someone to read and respond to our writing, I asked my older brother, a recent university graduate, to do so. He and I sit together while he reads the first drafts of my writing assignments. He gives me specific feedback on my organization, content, word choice, and transitions.

Initially I felt very awkward and defensive when Daniel was reading my papers. He often stopped reading to ask me to clarify an argument, or to explain the meaning of a sentence that seemed pretty obvious to me. After a few such meetings, however, I found that my brother's feedback was forcing me to examine my writing in a new way. I was learning to move from the role of writer to the role of reader, in order to assess whether what I was trying to say made sense from

the reader's point of view. Now I reread my papers from the reader's perspective.

Editing Strategies

Daniel also critiqued my grammar and punctuation, which have never been strong. After watching and listening to him, I was able to make some of these corrections myself. Although by no means an expert, I am learning how to edit and proofread my own work.

Thank you very much for the suggestion about using a reader. This practice and my patient brother's assistance have helped me to improve my writing skills.

Sincerely,

Adele Cameron

6.5 Analyzing and Revising Message Formats

As consumers, employees, and/or students, we all receive hardcopy letters regularly. Bring in two hardcopy letters you have received recently.

As your instructor directs,

- a. Share your examples with a small group of students.
- b. Identify the formats the writers are using.
- c. Identify any format errors.
- d. Be prepared to present your results to the rest of the class.

POLISHING YOUR PROSE

Making Pronouns Agree with Their Nouns

Pronouns stand in for nouns, and must agree with the nouns they refer to, so that your meaning is clear to your reader.

For the sake of clarity, make your pronouns agree in person (first, second, third) and number (singular, plural) with the nouns they replace.

	Singular	Plural
First person	I, my, mine, me, myself	we, our, us, ourselves
Second person	you, your, yourself	you, your, yourselves
Third person	he, she, it, him, her, his, hers	they, their, them, themselves

Incorrect: In my internship, I learned that you have to manage your time wisely.

Correct: In my internship, I learned to manage my time wisely.

Incorrect: The sales team reached their goal.

Correct: The sales team reached its goal. (*Team* is a collective or group noun, and takes a singular verb and pronoun.)

In Canada and the United States, company names and the words *company* and *government* are singular nouns. In Great Britain, these nouns are plural and require plural pronouns:

Correct (Canadian): Clarica trains its agents well.

Correct (U.S.): Nationwide Insurance trains its agents well.

Correct (U.K.): Lloyd's of London train their agents well.

Exercises

Identify and correct any errors. Note that some sentences do not contain errors.

1. An administrative assistant should help their boss work efficiently.
2. The mayor should give themselves credit for doing a good job.
3. The company announces their quarterly profits today.
4. Most new employees find that they need to learn a new culture.
5. A CEO's pay is often based on the performance of their company.
6. The union votes today on whether they will go on strike.
7. In my first month of work, I learned that you need to check email at least three times a day.
8. One of the features of my corporate culture is a willingness to share ideas.
9. The team will present its recommendations to the Executive Committee.
10. Every employee is interested in improving their technical skills.

Check your answers to the odd-numbered exercises in the Answer Key at the back of the text.



Practise and learn online with Connect. Connect allows you to practise important skills at your own pace and on your own schedule, with 24/7 online access to an eBook, practise quizzes, interactives, videos, study tools, and additional resources.