



# **Business Communication and Soft Skills**

Formatting Letters and Writing Business Reports



## **Business Communication & Soft Skills**

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# **3**

### **FORMATTING LETTERS AND WRITING BUSINESS REPORTS**

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**Editorial Team**

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Prof. R. Prasad  
IFHE (Deemed-to-be-University), Hyderabad

Dr. P. V. L. Ramana  
IFHE (Deemed-to-be-University), Hyderabad

Prof. Radhamohan  
IFHE (Deemed-to-be-University), Hyderabad

Dr. Vijaya Chandra Kumar Chambravalli  
IFHE (Deemed-to-be-University), Hyderabad

Prof. Showry  
IFHE (Deemed-to-be-University), Hyderabad

Prof. Chethna Krishna  
IFHE (Deemed-to-be-University), Hyderabad

---

**Content Development Team**

---

Prof. Sindhu Ravindranath  
IFHE (Deemed-to-be-University), Hyderabad

Dr. P. V. L. Ramana  
IFHE (Deemed-to-be-University), Hyderabad

Prof. K. Veena  
IFHE (Deemed-to-be-University), Hyderabad

Prof. Mushtakhusen S M  
IFHE (Deemed-to-be-University), Hyderabad

Dr. Niraj Kishore Chimote  
IFHE (Deemed-to-be-University), Hyderabad

---

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---

Ms. Jayashree Murthy  
IFHE (Deemed-to-be-University), Hyderabad

Mr. Chandrasekhar  
IFHE (Deemed-to-be-University), Hyderabad

Mr. Prasad Sistla  
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*Our E-mail id: [cwfeedback@icfaiuniversity.in](mailto:cwfeedback@icfaiuniversity.in)*

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**The ICFAI Foundation for Higher Education**  
(Deemed-to-be-University Under Section 3 of UGC Act, 1956)  
Donthanapally, Shankarapalli Road, Hyderabad- 501203.

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## **BLOCK 3:        FORMATTING LETTERS AND WRITING BUSINESS REPORTS**

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The third block of the course on Business Communication & Soft Skills deals with formatting letters and writing business reports and using visual aids and graphics in reports to enhance communication.

The fifteenth unit is *Structure and Layout of Letters*: The appearance of a letter makes the first impression on the reader. Good appearance adds to the content of the letter in appealing to the reader. Therefore, it is imperative that a writer ensures that the letter not only reads well but also looks good. This unit introduces the various punctuation styles and letter formats used in business communication, standard letter parts and special letter parts. It also showcases memorandum formats.

The sixteenth unit is *The Framework of a Report*: Reports are an essential management tool. This is mainly because a manager cannot personally look into every aspect of the business, he/she has to rely on others to collect and report information to them. This unit introduces the elements of a report and details how the text of a report should be crafted.

The seventeenth unit is *Writing Business Proposals and Business Plans*: Writing business proposal and business plan are very common. Business proposal could be either solicited or unsolicited. The writing of business proposal is designed accordingly. A business plan is a road-map on the functioning of the business. It includes promoting, funding and the target customers. It includes details of financial forecasts, expected revenue earnings, initial investment, working capital, measures adopted for raising investment and its periodicity. Thus the skill set for writing a business plan differs from that of a business proposal. This unit dwells on these issues.

The eighteenth unit is *Writing the Report*: Reports are business tools that assist managerial decision making and problem solving. Reports can be classified on the basis of form, direction, functional use and content. There are four steps in writing a report. Informational reports are structured on the basis of importance, sequence, chronology, spatial orientation and category of subtopics. This unit explains the various types of reports and the four steps involved in writing a report. It also shows how to structure a report, and how to generate conclusions and recommendations at the end of a report.

The nineteenth unit is *Presenting Data Using Visual Aids*: Visual aids in a presentation help to communicate the subject matter clearly. A graph or table is easier for the audience to understand as compared to a paragraph. Visual aids clarify and simplify data. This unit explains the role and importance of visual aids in presenting data, and lists the various types of visual aids that can be used. It also shows how visual aids can be incorporated in text to make it easier to understand.

The twentieth unit is *Review of Writing Skills*: Writing skills are important for a manager, as he/she has to manage a large amount of communication within and outside of the organization. A sentence is a basic unit of any written text. This unit shows a few basics of structuring a sentence, the role of punctuation in conveying the meaning of a

sentence, logical grouping of sentences to make a coherent paragraph and the various steps in writing an essay.

This Block is updated by including a new unit on *Writing Business Proposals and Business Plans*, the details of which are given under Unit 17. It was felt that knowing how to write Business plans and Business proposals is essential for learners. Further each unit is updated with current industry examples and excerpts from reputed journals and magazines. In Unit 19, role and importance of visual aids and types of visual aids were included.

## Unit 15

### Structure and Layout of Letters

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#### Structure

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- 15.1 Introduction
- 15.2 Objectives
- 15.3 Punctuation Styles and Letter Formats
- 15.4 Standard Letter Parts
- 15.5 Special Letter Parts
- 15.6 Memorandum Formats
- 15.7 Summary
- 15.8 Glossary
- 15.9 Self-Assessment Test
- 15.10 Suggested Readings/Reference Material
- 15.11 Answers to Check Your Progress Questions

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#### 15.1 Introduction

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The previous unit showcased the skills required for writing good memos. It explained the types of memos, the fundamentals of a good memo, persuasive memos and the ways to write memos for unpleasant news. This unit is on structure and layout of letters.

The appearance of a letter makes the first impression on the reader. Good appearance adds to the content of the letter in appealing to the reader. Therefore, it is imperative that a writer ensures that the letter not only reads well but also looks good.

Good quality bond paper that does not turn into yellow fast; personalization using a letterhead with the company's name address, phone and fax numbers and an email address; and proper placement and punctuation go a long way in making a letter look neat, professional and impressive.

This unit introduces the various punctuation styles and letter formats used in business communication, standard letter parts and special letter parts. It also showcases memorandum formats.

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#### 15.2 Objectives

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After studying this unit, you will be able to:

- Explain the different letter formats such as block, modified block and simplified block letter formats for making it pleasant and appealing for the reader to read

### **Block-3: Formatting Letters And Writing Business Reports**

- List the various parts of a standard letter for having an organized letter
- Identify mailing notation, attention line and other special parts of a letter
- Illustrate the parts of a memo for conveying the message within an organization

#### **15.3 Punctuation Styles and Letter Formats**

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Two punctuation marks are customarily used in business letters: open and mixed. The mixed punctuation style uses a colon after the salutation and a comma after the complimentary close. Open punctuation uses no punctuation after either the salutation or the complimentary close.

Exhibit 15.1 provides guidelines for business letter-writing.

##### **Exhibit 15.1: Business letter-writing guidelines**

- Always use letterhead and envelope design templates to look professional.
- Use appropriate format and template. For example, you may use Microsoft's Built-in Wizard
- Be friendly and professional in your tone exhibiting 'you' attitude.
- Communication should be simple, straightforward and concise.
- Have sections, sub headings and highlight keywords
- Highlight with color font to emphasize key words
- Use Auto text
- Connect to your readers wherever possible
- Understand and be friendly with your readers
- Indicate your reader what you are expecting from them
- Proof read thoroughly to avoid spelling and grammatical mistakes.
- Add small box. Make bullet points

*Source: <https://www.xerox.com/en-us/small-business/tips/business-letter>  
accessed on 7.10.21*

##### **15.3.1 Formats**

The three letter formats that are usually used are the block, the modified block, and the simplified block.

##### **Block**

In this format, all the lines begin at the left margin. Pl refer Exhibit 15.1.



**Exhibit 15.1: Block Format with Open Punctuation**

	<p><b>The Society of Bird Watchers</b> Juhu Chapter, Bird Watchers' Lane, Juhu</p>
	<p>November 11, 2021</p>
Date Line	<p>Mr. Ajit M. Suri 1938 Andher Nagari Avenue Andheri, Mumbai 6543219</p>
Inside Address	<p>Dear Mr. Suri</p>
Salutation	<p>Your recent article in the Bird Lovers' Digest "Are Bird Watchers Becoming an Endangered Species?" has attracted the attention of all bird lovers in the city.</p>
Body	<p>As you must be aware, there are at least thirteen bird lovers' associations in this city. There has been a growing feeling among members of several of these associations that there should be greater coordination among them. As a step in this direction, we have made arrangements for an informal get-together. About 200 members will attend this dinner meeting. They will be glad to meet you and listen to your views on "Threats to Bird Watching in a Metropolis".</p> <p>By accepting this invitation, you will be able to meet other bird lovers in the city. We are sure you will find many who share your concerns about the problems that bird watchers face in this city. The meeting will be at the Hum Panchchi Ek Dal Ke Hotel on December 16, 2021 at 5 p.m. We promise you a pleasant evening and an attentive audience. We would appreciate it if you would allow us to print a photograph of yours in the program and request you to send us one that we can use.</p>
Complimentary Close	<p>Sincerely</p>
Signature Block	<p>Lalita Popat</p>
Reference Initials	<p>Assistant Manager</p>

(<https://books.google.co.in/books?id=PceHmM0v5IwC&pg=PA77&lpg=PA77&dq=%22We+promise+you+a+pleasant+evening+and+an+attentive+audience.%22&source=bl&ots=f->)

### Block-3: Formatting Letters And Writing Business Reports

#### Modified Block

In this format, the date line, complimentary close, and the signature block begin at, or near the horizontal center of the page. All other lines begin at the left margin. Pl refer Exhibit 15.2.

#### Exhibit 15.2: Modified Block Format with Mixed Punctuation

	DATTE'S Small Engines Malkauns Road, New Bombay, 7702678
Date line	November 11, 2018
Inside Address	Mr. Asim Banerjee 4513 Cotton Town Street Kolkata, 6282288
Salutation	Dear Mr. Banerjee:
Body	<p>Vinayak motors are among the most dependable small electric motors manufactured in India today. Here at Datte's Small Engines, we believe that it is critical to use the right size Vinayak engine for a particular job.</p> <p>The three-month warranty for the Vinayak motors applies only if the motor is used under normal operating conditions.</p> <p>Your pipe size (3/15 inch), the large distance between your pool and the filtering system (100 feet), and the size of your pool (50 by 60 feet) placed undue stress on the 2.5 horse-power motor. Your sales receipt indicates that a 3.5 horsepower motor was recommended based on our evaluation of your needs.</p>
Complimentary Close	Our sales forces will be happy to show you the 3.5 horsepower Vinayak motor. This powerful motor should provide clear, sparkling water for the enjoyment of your family.
Signature Block	Sincerely,
Reference Initials	Abdul Karim ms Manager

Source: ICFAI Research Center

### **Simplified Block**

As in the block format, all lines begin at the left margin, but the salutation and complimentary close are omitted while a subject line is included. The subject line is placed a double space below the inside address and a double space above the body.

---

### **Check Your Progress - 1**

1. Standard or mixed punctuation uses \_\_\_\_\_ after the salutation and a comma after the complimentary close.
  - a. A period
  - b. And exclamation mark
  - c. A semicolon
  - d. A colon
  - e. quotation mark
2. Which of these is not a letter format?
  - a. Block
  - b. Modified block
  - c. Extended block
  - d. Simplified block
  - e. Modified and simplified blocks

---

## **15.4 Standard Letter Parts**

There are certain conventions to draft business letters. The essentials of a standard letter are given below.

1. Heading and Date
2. Inside Address
3. Salutation
4. Body
5. Complimentary Close
6. Signature Block
7. Reference Initials

### **Heading and Date**

The heading contains the writer's address. Many businesses incorporate this information in the letterhead. The date is typed two to six lines below the last line of the letterhead and can be placed at the left-hand margin, in the center, or

### **Block-3: Formatting Letters And Writing Business Reports**

at the end near the right-hand margin. The month should be spelled out, not abbreviated, followed by the day and year. It is better to avoid putting the date in numerals – 12.9.2018 – as it might create some confusion in international correspondence. If the letter is written on blank paper, the writer's address must come immediately above the date. The writer's name is omitted because it appears in the signature block.

#### **Inside Address**

The inside address usually begins four spaces below the dateline. It includes a personal or professional title, the name of the person and the company to whom the letter is being sent, and the complete address.

#### **Salutation**

The salutation is a greeting that precedes the body of the letter. It is placed a double space below the inside address. There are a number of acceptable salutations. If the letter is being sent to a specific person, the individual's name should be used: Dear Mr. Kulshreshtha. If you do not know whether the recipient is a male or a female, the whole name can be used or salutation can be omitted to avoid offending the person. Sometimes, the recipient's official title is used: Dear Accounts Officer. In the case of sales letters or announcements that are sent out to many people, a general salutation may be used: Dear Customer, Dear Policyholder.

Some writers now use a salutopening on the salutation line. This is an opening line that omits "Dear," begins with the first few words from the body of the message, and incorporates the reader's name. Here is an example:

Thank you, Mr. Brown, (Salutopening)

For the prompt payment of your bill (Body)

#### **Body**

The body of the letter contains the message. It begins a double space below the salutation. The text is usually single-spaced, with double spacing between the paragraphs. Tables, numbered items, long quotations and other such material should be set up in such a way that they are easy to read.

#### **Complimentary Close**

This is a phrase that closes the letter. The complimentary close chosen must reflect the formality of the relationship with the reader. The most commonly used closes are "Sincerely," "Yours truly," "Cordially," "Cordially yours," and "Sincerely yours." It is positioned a double space below the body. Salutation and close are omitted in the simplified block style.

### Signature Block

The writer's name usually comes four spaces below the complimentary close (or body in the simplified block letter). The writer's signature goes into the space provided. If the writer is speaking legally for the company, the firm's name is typed in capital letters three spaces below the complimentary close and the writer's name is typed four spaces below that, with his/her title on the next line.

### Reference Initials

The initials of the person who has keyed in or typed the letter appear in lowercase a double space below the signature block.

#### Activity 15.1

You are the finance manager of a company. Write a letter to a customer informing him about the change in the credit policy of your company that entitles him to avail a waiver on the interest if the entire amount due is paid within the next three months.

**Answer:**

---

### Check Your Progress - 2

3. In business letters, some writers now use a \_\_\_\_\_ instead of a salutation.
    - a. Salute
    - b. Salutopening
    - c. Sub-compliment
    - d. Sub-opening
    - e. Salute closing
  4. All of these are standard letter parts except
    - a. Heading and date
    - b. Attention line
    - c. Salutation
    - d. Inside address
    - e. Signature block
-

## **15.5 Special Letter Parts**

The components of the letters we have discussed so far are the standard features of business letters. However, a letter may have several other parts like (1) Mailing notation, (2) Attention line, (3) Reference line, (4) Subject line, (5) Second-page heading, (6) Enclosure notation, (7) Copy notation, and (8) Postscript. Example 15.1 gives special letter parts: Page 1.

<b>Example 15.1: Special Letter Parts: Page 1</b>	
	Spencer & Taylor Ltd. 37 Chowrangee Lane, Kolkata <b>(033) 5567824</b>
Mailing Notation	November 11, 2018
Attention Line	Facsimile Attention Ms. Janaki Menon Communications Systems, Inc. Model Building, Room 250 Hyderabad AP 500 082 RE: Engagement No.39-29-3773
Reference Line	Ladies and Gentlemen: Engagement Agreement
Subject Line	Spencer Taylor is pleased to confirm our arrangements to audit the financial statements of Communication Systems, Inc., for the year ending Dec 2018.

*Source: ICFAI Research Center*

### **Mailing Notation**

A mailing notation is used to indicate either how the letter was sent – registered, certified – or how the letter is to be handled – confidential, personal. The notation may be typed in capital letters or underlined and can be placed at the top or bottom of the letter. If it is at the top, it should be either above the inside address on the left-hand side or just below the date on the right-hand side (in the modified block format). If placed at the bottom, it should be either below the copy notation or below the last notation, whatever it is.

### **Attention Line**

The attention line directs a letter to a particular person – “Attention Ms. Kamalakshi” – or a position in the company – “Attention Personnel Manager”

– or a department – “Attention Personnel Department.” It is placed above the inside address.

### Reference Line

A reference line – “Re: contract 248-2983”– directs the reader to previous files or documents. It is usually put a double space below the inside address.

### Subject Line

The subject line tells the readers what the letter is about. It is commonly used in the simplified block letter. In other formats it is optional. The subject line is keyed in a double space below the salutation. If the modified block style is used, then the subject line may be centered. The word ‘subject’ is omitted in letters.

### Second-Page Heading

The second and successive pages of multi-page letters and memoranda are keyed in on plain paper. A heading on the second and successive pages identifies them as a continuation of the first page. The heading includes the name of the person or company to whom the message is sent, the page number and the date. Example 15.2 gives special letter parts:

Example 15.2: Special Letter Parts: Page 2	
Second-page Heading	Communications Systems, Inc. Page 2 November 9, 2018 Anita Shrivastav has been assigned as the audit manager in charge of your audit examination. Please review the enclosed preliminary time schedule she has developed and direct your questions to her at 5567824, extension 25. We at Spencer & Taylor look forward to providing these and other quality professional services to you. Sincerely, Azhagappa Veerappan Audit Partner.
Reference Initials	cf
Enclosure Notation	Enclosure: Audit Agreement
Copy Notation	Cc: Mr. Atul Dadiwala
Postscript	Our annual tax update has been scheduled for March 5-6, 2018. You will receive an agenda from the tax department, as soon as all details have been finalized.

Source: ICFAI Research Center

### **Block-3: Formatting Letters And Writing Business Reports**

#### **Enclosure Notation**

An enclosure notation is used when papers or documents like brochures, price lists or résumés accompany the letter. This notation is keyed in a double space below the reference initials. An enclosure notation can also specify the items enclosed.

#### **Copy Notation**

A copy notation is used when copies of the correspondence are sent to people other than the addressee. The notation is placed two lines below the reference initials or enclosure notation. The different copy notations are c (copy), xc (xerox copy), cc (carbon copy), or pc (photocopy). The copy notation is omitted when a copy of a letter is sent to someone without the recipient's knowledge.

#### **Postscript**

The last item that appears on the letter, the postscript, was earlier used to include information that was omitted from the letter. However, with word-processing software, writing, retrieving, and editing letters has become a simple task and the postscript no longer serves its purpose. Today, postscripts are largely used to emphasize something. For instance, a sales letter may use a postscript to underline the central selling point. The postscript is keyed in a double space below the last notation or the signature block if no notations are used.

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#### **Check Your Progress - 3**

5. In a letter, the notation *xc* stands for \_\_\_\_\_.
  - a. Xerox copy
  - b. Carbon copy
  - c. Express copy
  - d. X the copy
  - e. Photocopy
6. The last item that appears on the letter, the postscript, was earlier used to include information that was omitted from the letter. Today postscripts are largely used to \_\_\_\_\_ something.
  - a. Describe
  - b. Insert
  - c. Emphasize
  - d. Edit
  - e. Evaluate



7. The word “FACSIMILE” at the top or the bottom of a letter can be termed a/an \_\_\_\_\_.
  - a. Attention line
  - b. Subject line
  - c. Mailing notation
  - d. Copy notation
  - e. Photo notation
8. The \_\_\_\_\_ is a greeting that precedes the body of the letter.
  - a. Invocation
  - b. Introduction
  - c. Preamble
  - d. Salutation
  - e. Attention line
9. Special letter parts include all of the following except \_\_\_\_\_.
  - a. Mailing notation
  - b. Exit notation
  - c. Enclosure notation
  - d. Copy notation
  - e. Reference line

---

### 15.6 Memorandum Formats

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Memos are messages sent to offices or individuals within an organization. A memo has four standard parts: heading, body, authentication, and page identification.

*Heading:* The heading lists the date, the name of the sender, and the subject of the memo.

*Body:* The body of the memo has no opening or closing. It begins with communication of facts. The body is usually single-spaced with a blank line between paragraphs.

*Authentication:* A memo is authenticated when it is signed or initialed by the writer. The writer's initials or signature can come at the top left, next to the person's name, in the upper right-hand corner, or after the last sentence of the memo.

*Page identification:* If the message runs into two or more pages, the second and subsequent pages should be numbered and the subject and date of the memo should be typed in the upper left-hand margin of each accompanying page. However, this unit deals with the general guidelines for structuring letters,

### Block-3: Formatting Letters And Writing Business Reports

minor variations in the way letters are structured occur from organization to organization and from time to time.

Irrespective of the convention used, it must be ensured that a letter is neatly structured so that it facilitates easy reading, has a neat appearance, and is free of spelling, grammar, and typographical errors.

#### Activity 15.2

You are the branch manager of Hindustan Lever Limited at Hyderabad. One of your marketing executives promised an additional discount of 5% over and above the permitted level for sales beyond ` 2.0 crore. But the instructions from the head office do not permit such discount. Write a memo to the concerned marketing executive asking him to explain, why disciplinary action cannot be taken against him?

**Answer:**

---

#### Check Your Progress - 3

10. The standard memo parts are
- Heading; body; verification; and page identification
  - Heading; body; authentication; and self-identification
  - Heading; body; authentication; and page identification
  - Heading; context; authentication; and page identification
  - Heading, authentication, body, page identification, context

---

### 15.7 Summary

- A good appearance of a letter makes it pleasant for the reader to read it.
- Block, modified block, and simplified block are the formats used for letter writing.
- The standard components of a letter are 1) Heading and date; 2) Inside address; 3) Salutation; 4) Body; 5) Complimentary Close; 6) Signature Block; and 7) Reference Initials.
- Memos are used for conveying messages within an organization.
- A memo has a heading, body, authentication, and page identification.

## 15.8 Glossary

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**Authentication:** A memo is authenticated when it is signed or initialed by the writer.

**Complimentary Close:** This is a phrase that closes the letter.

**Postscript:** The last item that appears on the letter, the postscript, was earlier used to include information that was omitted from the letter. Today, postscripts are largely used to emphasize something.

**Reference Initials:** The initials of the person who has keyed in or typed the letter appears in lowercase a double space below the signature block.

**Salutation:** The salutation is a greeting that precedes the body of the letter. It is placed a double space below the inside address.

**Simplified Block Format:** As in the block format, all lines begin at the left margin, but the salutation and complimentary close are omitted while a subject line is included. The subject line is placed a double space below the inside address and a double space above the body.

## 15.9 Self-Assessment Test

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1. What are the different punctuation styles and formats that can be used to enhance the appearance of a letter?
2. What are the various standard letter parts? How do they ensure clarity and better understanding?
3. What are the standard components of a memo that help in conveying organizational messages?

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### 15.11 Answers to Check Your Progress Questions

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#### 1. (d) A colon

Two punctuation styles are customarily used in business letters: open and mixed. Standard or mixed punctuation, the traditional style, uses a colon after the salutation and a comma after the complimentary close. Open punctuation uses no punctuation after either the salutation or the complimentary close.

**2. (c) Extended block**

The three letter formats that are usually used are the block, the modified block and the simplified block. There is no such thing as an extended block format.

**3. (b) Salutopening**

Some writers now use a salutopening on the salutation line. This is an opening line that omits “Dear,” begins with the first few words from the body of the message, and incorporates the reader’s name. After this, there is a double space and the body of the letter continues. Here is an example:

Thank you, Mr. Brown, (Salutopening)

For your prompt payment of your bill (Body)

**4. (b) ii only**

An attention line is not a standard letter part; it is a special letter part.

**5. (b) Xerox copy**

A copy notation is used when people other than the addressee are sent copies of the correspondence. The notation is placed two lines below the reference initials or enclosure notation. The copy notation xc stands for “xerox copy.”

**6. (c) Emphasize**

The last item that appears on the letter, the postscript, was earlier used to include information that was omitted from the letter. However, with word-processing software making retrieving and editing letters a simple task, the postscript no longer serves this purpose. Today postscripts are largely used to emphasize something. For instance, a sales letter may use a postscript to underline the central selling point.

**7. (c) Mailing notation**

A mailing notation is used to indicate either how the letter was sent – registered, certified, faxed – or how the letter is to be handled – confidential, personal. The notation may be typed in capital letters or underlined and can be placed at the top or bottom of the letter. If it is put at the top, it should be either above the inside address on the left-hand side or just below the date on the right-hand side (in the modified block format). If placed at the bottom, it should be either below the copy notation or below whatever is the last notation.

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#### **8. (d) Salutation**

The salutation is a greeting that precedes the body of the letter. It is placed a double space below the inside address.

#### **9. (b) Exit notation**

An exit notation is not a special letter part. The special letter parts are (1) mailing notation, (2) attention line, (3) reference line, (4) subject line (5) second-page heading, (6) enclosure notation, (7) copy notation, and (8) postscript

#### **10. (c) Heading; body; authentication; and page identification**

The standard memo parts are heading; body, authentication, and page identification. “Verification,” “self-identification,” and “context” are not memo parts.

## Unit 16

# The Framework of a Report

### Structure

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- 16.1 Introduction
- 16.2 Objectives
- 16.3 The Elements of a Report
- 16.4 The Text of a Report
- 16.5 Summary
- 16.6 Glossary
- 16.7 Self-Assessment Test
- 16.8 Suggested Readings/Reference Materials
- 16.9 Answers to Check Your Progress Questions

### 16.1 Introduction

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The previous unit introduced the various punctuation styles and letter formats used in business communication, standard letter parts and special letter parts. It also showed various memorandum formats. This unit is on writing reports.

Reports are essential management tools. This is mainly because a manager cannot personally look into every aspect of the business. He/she has to rely on others to collect and report information to other colleagues.

Seeing how a report is essential for management, the goal in making a report should be that the information in it is clear and convenient for the student to comprehend. The elements of a report should be carefully crafted and demarcated, for the report to be clear and readable. The body of the report must be developed in a logical and focused manner.

This unit introduces the elements of a report and details of how the text of a report should be crafted.

### 16.2 Objectives

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After studying this unit, you will be able to:

- List the basic elements of a report
- Explain the contents of the body of a report
- Illustrate how the elements of a report are governed by purpose and context of communication

### 16.3 The Elements of a Report

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A report has a number of components. However, it is not necessary that all the components are included in every report. In fact, each organization has its own,

### Block-3: Formatting Letters And Writing Business Reports

convenient style of reporting. Successful reports of an organization can be referred to understand the style of the report. While preparing reports, the reader's needs have to be given the most importance.

The following elements will be discussed here:

1. Letter of transmittal
2. Title page and title fly
3. Abstract
4. Table of contents
5. List of illustrations
6. Executive summary
7. Glossary and list of symbols
8. Appendix

#### The Letter of Transmittal

The letter of transmittal epitomizes the report and presents to the principal reader. It is attached to the report or simply placed on top of it.

Exhibit 16.1 provides an example of letter of transmittal.

**Exhibit 16.1: Transmittal Letter**

Prof. Ram Kumar  
November 11, 2018  
University of Fine Arts  
Hyderabad

Dear Prof. Ram Kumar,

We submit a report you requested on 11 November 2018. With this report, we would like to inform you about our decisions for the Centre. The report also records some of the structural modifications. The latest technology is being discussed. You can call me on 040-23456789 for any queries.

Sincerely  
Rakesh Mehta  
Lead Engineer

*Adapted from [writing.colostate.edu/references/documents/ce-trpt/pop3a.cfm](http://writing.colostate.edu/references/documents/ce-trpt/pop3a.cfm).*

This is not an example of a good transmittal letter. The letter of transmittal (or memo) gives the writer an opportunity to emphasize important or interesting things about the attached materials. It also serves to point out any errors or omissions in the material. The Exhibit 16.1 does not reflect these aspects.

A good transmittal letter generally contains the following:



1. The title and the main objective of the report.
2. When was the project commissioned and by whom.
3. The methodology applied, the results, conclusions and the suggested recommendations if any.
4. Acknowledging any resource referred to while making the report.
5. An amiable offer to explain the contents therein or carrying out further such projects.

The transmittal letter/memo is informal and conversational (uses personal pronouns) in style.

### **The Title Page**

The title page consists of a title, the date of submission, the names and positions of the writer (or organization) and the principal reader (or organization). A good title is sufficiently informative and highlights the subject of the report and the type of report. A descriptive title should be used wherever possible. In some organizations, a title page is preceded by a title fly – a plain sheet of paper with only the title on it. The title page formalizes the report.

### **The Abstract**

An abstract is a brief technical summary of about 200 words. It is aimed at readers who are familiar with the subject. An abstract usually contains technical terminology and references to advanced concepts that have been dealt with in the report. It helps the readers decide if they have to read the full report.

There are two basic types of abstracts – descriptive and informative. The *descriptive abstract*, sometimes called the topical or table of contents abstract, simply describes the topics covered in the table of contents, giving equal coverage to each.

The *informative* abstract presents the major information that the report conveys. Instead of merely covering all the topics in a superficial manner, it states the problem, the scope and methods used (if appropriate), and the major results, conclusions, or recommendations.

The basic structure of the informative abstract includes three elements – the identifying information, the problem statement, and the important findings.

### **The Table of Contents**

This element (Table of Contents) is crucial to the report because it helps different readers to turn to specific pages to find the information they want. Because a report usually has no index, the table of contents provides the only guide to the report's structure, coverage, and pagination. The headings listed in the table of contents are identical to the headings that appear in the report itself.

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#### The List of Illustrations

A list of illustrations is a table of contents for the figures and tables contained in the report. If the report contains figures but not tables, the list is called a *list of figures*. If only tables are presented, then a list of tables is provided. If both tables and figures are included in the report, then the lists are separately provided. Both put together are called *list of illustrations*.

#### The Executive Summary

The executive summary (sometimes called the epitome, the executive overview, the management summary, or the management overview) is a one-page condensation of the report. It is intended for managers who have to cope with a tremendous volume of paper work every day.

Exhibit 16.1 presents guidelines for writing an executive summary.

##### **Exhibit 16.1: Guidelines to prepare executive summaries**

**An executive summary is part of a larger report for a business plan or project proposal.** Executive summaries are read by everyone who are concerned with the project. There is every chance to make or break the business plan or project plan.

The guidelines to prepare executive summaries are:

- The size of the summary in general should be five to 10 percent of the length of the whole report.
- **Appropriate Language is to be used**
- It is essential to capture readers' attention,
- Always introduce yourself highlighting your strengths
- No new material to be given, other than what is in the project report

All relevant information is to be provided.

Source: <https://www.projectmanager.com/blog/write-an-executive-summary>  
August 12, 2021

Normally, executive summary contains two parts namely background and major findings / implications.

- a. **Background:** Managers are not generally technically competent in the topic discussed in the report. Hence, background of the project is presented clearly. The specific issue addressed in the report is briefed explicitly.
- b. **Major findings and implications:** Managers cannot devote time to go through the report in detail. The major findings, conclusions based on the study are reported, duly dovetailing it with recommendations.

### **The Glossary and List of Symbols**

A glossary is an alphabetical list of definitions. It is particularly useful while addressing readers not familiar with the technical vocabulary used in the report.

A list of symbols is structured like a glossary, but instead of defining words and phrases, it defines the symbols used in the report to avoid any misinterpretation.

### **The Appendix**

Bibliography, glossary and list of symbols etc. are appended at the end of the report, and lettered as appendix I, II etc. Only a few of the readers will be interested to go through and appreciate. Hence, they do not find place in the main body of the report.

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### **Check Your Progress - 1**

1. The title fly adds a touch of \_\_\_\_\_ to a report.
  - a. Formality
  - b. Seriousness
  - c. Levity
  - d. Complexity
  - e. Simplicity
2. Which of the following is not one of the 'elements' of a report?
  - a. Request for the report
  - b. Abstract
  - c. List of illustrations
  - d. Executive summary
  - e. Appendix
3. Which of the following is not included in a Letter of Transmittal?
  - a. A statement of the title
  - b. An acknowledgment of any assistance received in preparing the material
  - c. A diagram showing the progress of the report
  - d. A statement of the principal results, conclusions and recommendations
  - e. The methodology applied, the results, conclusions and the suggested recommendations if any
4. If a report contains both figures and tables, figures are listed separately, before the list of tables, and the two lists together are called a \_\_\_\_\_.
  - a. List of illustrations
  - b. List of tables

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- c. List of figures
  - d. List of tables and figures
  - e. List of tables, figures and illustrations
5. In a report, a list of definitions is called a / an \_\_\_\_\_.
- a. Glossary
  - b. Explanatory list
  - c. List of definitions
  - d. Comprehensive list of definitions
  - e. Bibliography
6. The two basic types of abstracts are generally called \_\_\_\_\_.
- a. Informative and informational abstracts
  - b. Descriptive and executive abstracts
  - c. Informative and executive abstracts
  - d. Descriptive and informative abstracts
  - e. Informative and non-descriptive abstracts

#### Tips on Writing Project Report

**Title:** It should speak of the research activity precisely.

**Summary:** In about 250 words, a very brief account of the research work and the report.

**Introduction:** This aims to warrant that the reader understands the report. Include a write up on the need for the research and how it relates to published work. It makes easy for the readers, when literature review is provided here.

**Methods:** Provide a logical account of how you have piloted your study, why you have chosen your methods, their significance to the research question, topic and objectives. Also must define the design of your study, the research sample, the instruments used, unforeseen events and changes made and how the data were analyzed.

**Analysis:** Appropriate statistical software and methods to analyse and identify significant findings from the research needs to be used.

**Discussion:** This section brings together the different themes of literature and your research. Start with a summary of your key findings and then go to a comparative account of how your research is related to others.

A useful framework for discussion is 'Cubing' (considering a topic from six points of view): •Define •Compare •Subordinate •Investigate •Apply

*Contd....*

•Discuss for or against recognition– recognize any individual or organization that has supported your work

**References:** Note that reference guidelines vary for different publications

**Annexes:** Few to be attached at the end of the report.

## 16.4 Text of a Report

Text of a report has similarities to that of an oral presentation.

1. Give a brief list of topics being discussed. (Introduction)
2. Tell them (body).
3. Tell them what you told (summary, conclusions, recommendations).

This kind of structure enables readers to preview and review key points in the report.

### Introduction

The introduction of a report:

- Contextualizes the report by tying it to a problem or an assignment.
- States the purpose of the report.
- Previews the report’s contents and organization.
- Establishes the tone of the report.

### Activity 16.1

You are required to present a report on “Natural resources and the need to conserve them.” Outline the structure of the report and the basic elements that you would include in it.

**Answer:**

The topics that are generally covered in an introduction are – Authorization, Problem/Purpose, Scope, Background, and Limitations.

### The Body of Report

This section follows the introduction. It consists of the major sections that present, analyze, and interpret the findings gathered as part of the investigation.

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These sections contain the detailed information necessary to support the conclusions and recommendations.

#### Summary, Conclusions, and Recommendations

These three words indicate different purposes and meanings. In the case of small reports, all of them could be written up in a page or so. But for longer reports like research reports, each one will be written elaborately.

**Summary:** The whole contents of the report are rephrased and briefly told in the order they appear in the report.

**Conclusions:** The writer's findings based on the analysis; put differently it captures the answers to various questions or issues that triggered the need for the report.

**Recommendations:** Based on the logic the writer gives recommendation for future action.

Business reports are often a mix of the direct and indirect approaches and cannot be neatly classified by organizational pattern.

Many report writers also combine the conclusions and recommendations under one heading because it is often difficult to present a conclusion without giving a recommendation.

In order to facilitate the readers to understand the recommendations, it is better to list them separately and clearly. If there are too many conclusions/recommendations, it may be a good idea to prepare a list and present at the end of the report.

#### Notes and Bibliography

The sources from which the text of a report has been written should be acknowledged. One approach, especially for internal reports, is simply to mention a source in the text. Another more convenient approach is to cite the source in the text and present the details in the "notes" section at the end of the text of the report. Arabic numerals should be used to indicate the appropriate note. All the references made to various authors or books or articles, should be provided in 'Bibliography' which will be the last part of the report.

#### Activity 16.2

You are required to make an internal report for your organization. How will you cite the sources you have used for making the report?

**Answer:**


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**Check Your Progress - 2**

7. Bibliography in a report is \_\_\_\_\_.
    - a. It comes at the middle of the report
    - b. It is mentioned at the beginning of the report about the authors
    - c. All the references made to various authors or books or articles
    - d. All the references made to various books
    - e. All the references made to various articles
  8. A long report generally has separate sections called "Summary," "Conclusions," and "Recommendations." A summary consists of \_\_\_\_\_.
    - a. The key findings of the report, paraphrased from the body and stated (or listed) in the order in which they appear in the body
    - b. The writer's analysis of what the findings mean. In other words, answers to the questions that led to the report
    - c. Opinions, based on reason and logic, about the course of action that should be taken
    - d. The results to the tests conducted.
    - e. Views of similar authors on the subject
  9. A long report generally has separate sections called "Summary," "Conclusions," and "Recommendations." The conclusions section consists of \_\_\_\_\_.
    - a. The key findings of the report, paraphrased from the body and stated (or listed) in the order in which they appear in the body.
    - b. The writer's analysis of what the findings mean. In other words, answers to the questions that led to the report
    - c. Opinions, based on reason and logic, about the course of action that should be taken
    - d. The opinion of similar authors on the observations.
    - e. The writers assumptions on the project
  10. If a report is organized deductively, the summary, conclusions, and recommendations are presented \_\_\_\_\_ the body and are only reviewed briefly at the \_\_\_\_\_.
    - a. Before.....end
    - b. At the end.....beginning
    - c. After.....beginning
    - d. In the executive summary preceding.....beginning
    - e. At the end.....beginning
-

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### 16.5 Summary

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- A report consists of the basic elements of 1) a letter of transmittal 2) title page and title fly 3) abstract 4) table of contents 5) list of illustrations 6) executive summary 7) glossary and list of symbols and 8) appendix.
- The text of a report consists of the introduction, body of the report, summary, conclusions and recommendations, and notes and bibliography.
- The elements of a report are governed by the purpose and the context of communication.

### 16.6 Glossary

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**Elements of a Report:** The “elements” of a report refer to those components that are usually included in a formal business report.

**Executive Summary:** The executive summary (sometimes called the epitome, the executive overview, the management summary, or the management overview) is a one-page condensation of the report.

**Letter of Transmittal:** The Letter of Transmittal introduces the purpose and content of the report to the principal reader. It is attached to the report or simply placed on top of it.

**List of Illustrations:** A list of illustrations is a table of contents for the figures and tables in the report.

**Title Page:** The Title Page consists of a title, the date of submission, the names and positions of the writer (or organization) and the principal reader (or organization).

### 16.7 Self-Assessment Test

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1. What are the components of a report?
2. How is the text within a report organized?
3. What are the components of a transmittal letter that help the readers in understanding a report’s purpose and content?

### 16.8 Suggested Readings / Reference Materials

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**16.9 Answers to Check Your Progress Questions**

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**1. (a) Formality**

In some organizations, a title page is preceded by a title fly. The title

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fly is a plain sheet of paper with only the title on it. It is not really necessary, but it adds a touch of formality to the report.

#### 2. (a) Request for the report

The request for the report precedes the report. It is not one of the elements of the report.

#### 3. (c) A diagram showing the progress of the report

Transmittal letters do not include diagrams showing the progress of reports. They generally contain most of the following elements:

A statement of the title, and, if necessary, the purpose of the report;

A statement of who authorized or commissioned the project, and when;

A statement of the methods used in the project (if they are noteworthy) or of the principal results, conclusions and recommendations;

An acknowledgment of any assistance received when preparing the material;

A gracious offer to assist in interpreting the material or in carrying out further projects.

#### 4. (a) List of illustrations

A list of illustrations is a table of contents for the figures and tables of a report. If the report contains figures, but not tables, the list is called a *list of figures*. If the report contains tables but not figures, the list is called a *list of tables*. If the report contains both figures and tables, figures are listed separately, before the list of tables, and the two lists together are called a *list of illustrations*.

#### 5. (a) Glossary

A glossary is an alphabetical list of definitions. Such a list is particularly useful if you are addressing a multiple audience that includes readers who will not be familiar with the technical vocabulary used in your report.

#### 6. (d) Descriptive and informative abstracts

The two basic types of abstracts are generally called descriptive and informative abstracts. The descriptive abstract is rapidly losing popularity, whereas the informative abstract is becoming the accepted standard.

The *descriptive abstract* sometimes called the topical or table of contents abstract, does only what its name implies. It simply describes the topics covered in the table of contents, giving equal coverage to each topic. So, in this type of abstract, the research methods, for example, would be mentioned even if they were not the focus of the report.

The *informative abstract* presents the major information that the report conveys. Instead of merely conveying all the topics in a superficial manner, it states the problem, the scope and methods (if appropriate), and the major results, conclusions, or recommendations.

**7. (c) All the references made to various authors or books or articles**

In all the reports, it is important to acknowledge the contribution to the report from various sources and authors etc.

**8. (a) The key findings of the report, paraphrased from the body and stated (or listed) in the order in which they appear in the body**

In a short report, the final wrap-up may be only a paragraph or two. A long report generally has separate sections called “Summary,” “Conclusions,” and “Recommendations.” These three labels differ in that they indicate different purposes. The term “summary” refers to the key findings of the report, taken out sequentially from the report in the same order as they appear in the report.

**9. (b) The writer’s analysis of what the findings mean. In other words, answers, to the questions that led to the report**

In a short report, the final wrap-up may be only a paragraph or two. A long report generally has separate sections called “Summary,” “Conclusions,” and “Recommendations.” These three labels differ in that they indicate different purposes. The “conclusions” section consists of the writer’s analysis of what the findings mean. In other words, answers to the questions that led to the report.

**10. (a) Before.....end**

If the report is organized deductively, the summary, conclusions, and recommendations are presented before the body, and are only reviewed briefly at the end. If the report is organized inductively, these sections are presented only at the end and are covered in detail.

## Unit 17

# Writing Business Proposals and Business Plans

### Structure

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- 17.1 Introduction
- 17.2 Objectives
- 17.3 Business Proposal
- 17.4 Types of Proposals
- 17.5 Contents of Business Proposals
- 17.6 Business plans
- 17.7 Summary
- 17.8 Glossary
- 17.9 Self-Assessment Exercises
- 17.10 Suggested Readings/Reference Materials
- 17.11 Answers to Check Your Progress Questions

### 17.1. Introduction

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In the previous unit, you learnt the framework of a report writing, contents of the body of report etc.

In this unit, you will study various aspects of writing a business proposal; it is a written document sent to a prospective client or the internal management for a specific job to be done. The proposals can be solicited or unsolicited/ internal or external. A solicited proposal is done formally using RFP – Request for proposal. RFPs are documents which specify the product or service to be provided, the qualifications sought, and the deadline for submissions. Here, the company has decided to make the purchase but looking out for a suitable vendor. For example, a textile industry may advertise an RFP in a leading newspaper about its requirement for good quality yarn – solicited external proposal. An unsolicited proposal is done when a proposal is sent to the prospective buyer, although it has not been asked for, because it is expected that the customer would buy from you. This unit covers various aspects of business proposals and business plans.

### 17.2. Objectives

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At the end of this module, you will be able to:

- Illustrate what a business proposal is for building up a business opportunity
- Describe a business proposal for obtaining positive response from prospective buyers

## Unit 17: Writing Business Proposals and Business Plans

- Discuss the components of a business plan to convince the investors that the business is a feasible investment opportunity
- To differentiate a business proposal and a business plan to expand business prospects

### 17.3. Business Proposals

A business proposal is a written document that presents information and sends precise request to the reader. In other words, it is a formal expression of interest in providing a service involving professional expertise in the form of products or services. A business proposal seeks to ask for commitment of resources like time, money and people. It is important to keep in mind that all business proposals have the major goal of selling.

The aim is that the buyer buys something from you, whether it is your time/expertise. Even special types of proposals like business plans are in essence marketing documents that seek to sell the company's offerings. Business proposals clearly state the goals, objectives of the company that is followed by a presentation.

#### 17.3.1 Difference between Business Proposals and Business Reports

Business reports communicate the future plans of the company on the basis of which business proposals are made for building business opportunities. The differences between the two are presented in Table 17.1.

**Table 17.1: Differences between Business Proposals and Business Reports**

Business Proposals	Business Reports
Convincing tone, persuasive in approach to obtain a positive response	Factual in nature, may be informative and persuasive.
Emphasis is on providing the best service and establishing trustworthiness in the minds of the reader	Focus on real issues and the ways to overcome a negative impact, if any.
Focus on future performance which yields beneficial results to the buyer	Based on past performance
Includes a budget statement based on which the buyer's decision depends	No budget is included

*Source: ICFAI Research Center*

#### 17.3.2 Difference between Business Proposals and Business Plans

A business plan and a business proposal are very different documents, with different purposes and goals. A business plan is a factual broad description of a company. A business proposal is a sales document intended to describe how a

### Block-3: Formatting Letters And Writing Business Reports

company will approach a client and attract him to invest in the company. The differences between the two are presented in Table 17.2.

**Table 17.2: Differences between Business Proposal and Business Plan**

<b>Business Proposals</b>	<b>Business Plans</b>
Sales document – explaining the details of a project, and requesting a client to allocate the project	Broad report of the company and its future prospects
Quote a price and call for action	Written presentation on real figures and achievements
Example: Used to gain projects from clients – B2B	Example: Used to get investors for the company – may be bank or venture capitalists

*Source: ICFAI Research Center*

#### 17.3.3 Rationale for a Business Proposal

Proposals may be voluntary business ideas offered to a potential partner, or they may be responses to requests for a proposal submitted to your company by a potential client. They are restricted in scope to a particular project or need. A business proposal has a specific audience. The most important reason for a business proposal is to solicit or build up a business opportunity.

#### 17.4 Types of Proposals

Writing proposals needs an attention to detailing. The purpose for which proposal is prepared is of prime importance. Different types of proposals are mentioned below.

##### 17.4.1 Expression of Interest (EOI)

An Expression of Interest (EOI) is a multi-stage process used to shortlist potential suppliers before seeking bids from the shortlisted tenderers. It is generally used when the information required is specific and requires clarification regarding the capability of suppliers to provide the required goods and services.

**Example:** A Government hospital advertises an EOI for supply of machines for CATH Lab, CT scan, MRI scan, etc.

##### 17.4.2 Request for Information (RFI)<sup>1</sup>

The purpose of a Request for Information (RFI)<sup>2</sup> is to collect written information about the capabilities of the suppliers and used for comparative

<sup>1</sup> <https://www.whitehouse.com.au/difference-rft-rfp-eoi-rfi/>... RFI and EOI are in a way similar to each other. RFI is called for when the purchaser does not have sufficient information on the proposal.

<sup>2</sup> <https://www.whitehouse.com.au/difference-rft-rfp-eoi-rfi/>... RFI and EOI are in a way similar to each other. RFI is called for when the purchaser does not have sufficient information on the proposal.

purposes. The organization builds an entire database through RFI which then leads to calling for RFQ, RFT, RFP, etc.

**Example:** The Highways Department requests the supplier to provide the detailed construction drawings of the proposed metro and provide clarifications of deviations if any.

#### 17.4.3 Request for Proposal (RFP)

Request for Proposal (RFP) is a document that an organization advertises to elicit bids from potential vendors for a desired solution. The RFP specifies what the organization is looking for and establishes evaluation criteria for assessing proposals.

**Example:** A new store specialising in ethnic wear advertises for an RFP for web designing, development and hosting.

#### 17.4.4 Request for Quotation (RFQ)

Request for Quotation (RFQ) involves more than the price quoted like payment terms, quality level per item, contract length, etc. RFQ acts as a legal binding document for the suppliers.

**Example:** The state government has requested various contractors to provide an RFQ to build the metro railways in the capital. This allows contractors to submit their RFQs. The best among them could be selected.

#### 17.4.5 Request for Tender (RFT)

A Request for Tender (RFT) is a formal, structured invitation for suppliers to bid and supply products and services (usually with government and public sectors). An official fee is charged to fortify and secure the process of bidding and winning the tender. This is done to ensure that transparency is maintained among competitors and the tender is given to the most suitable supplier. An example of RFT is given in Example 17.1.

**Example 17.1:** The National Highway Authority of India may advertise an RFT from prominent builders in the country to build and maintain certain (BOOT) (Build Own Operate and Transfer) national highways.

#### Exhibit 17.1: Steps to Writing a Successful Business Proposal

The following are the steps for writing a successful business proposal:

##### 1. Assimilate the Information You Need

At the outset a set of important questions be answered.

- Who is the final decision maker for the proposal and who else are part of the decision making process?

*Contd. ....*

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- **What is the pain socket?** Explore your competition to identify potential flaws or slits in their contributions.
- **Do you have a budget?** This will help you avoid wasting time on proposals that have no chance for profit.
- **Do you have a deadline?** It is useful to hit production or launch schedules.
- **Costs you need to incur if your proposal gets accepted?** Calculate labor or materials costs, and approximate the total projected revenue for your company.

#### 2. Outline the Scope of the Project

To sketch the project's scope, you need to find answers to the following:

- **Manpower requirements and delegation of work to them?**
- **What needs to be delivered to customers?**
- **Venue to get the work done and delivered**
- **Milestones in terms of project completion, settling of payments etc.**
- **How will customer satisfaction queries be addressed – quality assurance and risks mitigation?**
- **Why you have chosen what you have chosen in terms of your marketing strategy and why should customer select you?**

#### 3. Estimate Your Labor and Costs

You want to consider at an early stage how much the project will cost, and thus how much the customer will be charged. In other words, if you estimate that a project takes 10 hours, write it in your proposal as 15 hours ( $10 \times 1.5 = 15$ ). Why are you overestimating? Despite its appearance, this does not squeeze any extra bucks from the customer. Instead, projects often have unexpected turns and twists. Adding this extra time will help to take into account any potential snags and create a contingency budget. Moreover, if things go smoothly and you fall below your estimated hours, you can always offer bonus work or charge a lower amount to your customer. They both make very happy customers.

#### 4. Draft your business plan

This may take some time. Once it is ready hire a writer to fine tune your write up.

#### 5. Conclusion

Re-emphasize the exceptional results your company can provide in this part.

*Contd. ....*



The conclusion should be such that reader will be enthused to contact you.

## 6. Appendix

It is a discretionary section that includes any information that might not fit well in the body of your proposal. For example, you can include resumes or additional displays, predictions, and purchaser endorsements

## 17.5. Contents of a Business Proposal

Business proposals can be for internal and external purposes. They may be solicited or unsolicited. Thus each requires a different style of writing. These styles are discussed below.

### 17.5.1 Contents of Internal Solicited/Unsolicited Proposal

Internal proposals both solicited and unsolicited will be submitted within an organization – from the department Heads to the Management. The contents of an internal proposal are:

**The statement of problem** – The problem statement explains current context and explains how the proposal can solve it. It also discusses the rationale behind the proposal.

**The statement of solution** – This section includes the benefits that will be accrued if approved and the time-frame within which the solution holds good.

**Financial Implications/Budget** – This section has the estimation of expenses that will be incurred to solve the current situation.

**Conclusion** – This section will capture the key points that address the problems identified, so that the implementation thereof will benefit the company.

### Activity 17.1

Sabari Pvt. Ltd is in the business of offering fresh fruit juices to the consumers. Sales have not been good in the last quarter. The Marketing Manager, Bhandari, is of the opinion that adding a new flavor to its existing range of juices would be a boost to the declining sales. Market research has also revealed data indicating customer's preferences. He writes a business document to persuade the top management to buy the idea of adding a new flavor. What is the written document that Bhandari would use for this purpose?

**Answer:**

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#### 17.5.2 Contents of an External Solicited Business Proposal

An external solicited business proposal document consists of three parts: Prefatory parts, Main document, and the Supplementary section.

**Prefatory parts:** They capture the introductory part of the proposal.

*Transmittal letter* – A cover letter in which the whole proposal is explained in one page highlighting the bidder's qualifications, price and requesting for awarding the work-order.

*Title page* – Name of the company, the name of the company to whom the proposal is submitted and the date of submission.

*Table of contents* – Important for large proposals where different departments are required to read and take action.

*List of illustrations* – Most proposals represent timelines, project schedules and data in the form of charts and graphs. The list of illustrations indicates the page numbers of these illustrations in the proposal document.

**Main Document:** A main document has the following:

*Statement of the job* – This document conveys that the supplier understands the job well and is capable of handling the client's objectives and goals.

*Analysis* – The bidder analyses the approaches or methodology to reach the expected outcome in two sections – Technical and financial.

*Approach* – The bidder specifies the best approach in completing the task/project, his/her techniques and expertise, his/her superiority and testimonials (if any) and projects the strategic elements that argue in their favour.

*Schedule and benchmarks* – The timeline to complete the project and specific benchmarks to highlight successful completion of intermediary functions.

*Cost proposal, Payment schedules* – The last section of the proposal contains the details of the costs involved, the bidder's expectations of partial payments as the work proceeds.

*Deliverables and legal matters* – Terms and conditions and legal matters (signing of the contractual agreement) between the two parties.

*Conclusion* – The summary of the key points discussed in the main document.

**Supplementary Section:** A supplementary section comprises of

*Glossary* – Contains the technical terms used in the proposal in alphabetical order.

*References* – Sources of references used in the proposal – format must follow APA or MLA styles<sup>3</sup>

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<sup>3</sup> APA (American Psychological Association) is used by Education, Psychology, and Sciences. MLA (Modern Language Association) style is used by the Humanities.

*Appendix* – Additional information like photographs, testimonials, maps, résumés of experts, technical drawings, etc. is included in this section.

### 17.5.3 Preliminary Steps to Write an Effective Business Proposal

The 5W and 1H formula can be applied to ensure that all features have been covered to give a viable edge to the company's competitors. The RFP should answer the following questions:

- a. **What:** What has to be delivered, what will be the cost, expectations of the clients, payment terms and technology expertise, strengths of the company in handling the project.
- b. **Why:** Why should the company apply for the tender or proposal – long-term and short term gains?
- c. **Where:** Where will the process begin and where is the location of the project.
- d. **When:** When will the project start, schedule of key milestones to be achieved, deadline of the project.
- e. **How:** How will the work be done, be managed, how the company will achieve quality assurance, how will the risks be mitigated.
- f. **Who:** Who will be the team of persons responsible for each task – roles – expertise (internal and external consultants).

### 17.5.4 Tips for Writing Effective Business Proposals

Some tips for writing a business proposal effectively are given hereunder:

#### ➤ Understand the Client's Requirements

The first step is to gain a clear understanding of the client's needs and requirements. It is essential to read the 'Request for Proposal (RFP)' thoroughly. The following questions should be asked:

1. What does the client organization stand for?
2. What are its goals?
3. Why does it want to achieve these goals?
4. What is the stipulated time-frame, scope of the work and the budget?
5. How can you / the organization help in achieving these goals?
6. Will you / the organization be able to complete the work within the budget allocated and the set time-frame?
7. Do we have adequate resources to meet the client's expectations?

#### ➤ Understand the Client and their Problem

It is essential to understand the client's problem in order to design a proposal. A direct interaction with the client, its employees, researching on their management philosophy and operational policies etc., shall help in

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gaining a first-hand understanding of the client's requirements. Some questions that may provide a greater understanding of the client may include:

1. What business is the company into?
2. How long has the company been in this business?
3. What strategies has the company adopted over the years?
4. What is the nature of the industry the company operates in?

#### **➤ Design a Methodology**

A frame-work of the proposed methodology should be the next step. This first draft of the proposed methodology shall help understand the steps required to reach the desired goal. This shall also help to assess the resources required and will provide an insight into the 'cost and benefit' associated with the same.

#### **➤ Evaluation**

The next step in the process should focus on self-evaluation of the proposal. with respect to the RFP. *For instance, if the client is expecting to complete the project within a strict time-frame, the proposal must take the same into account. It should highlight how the company shall complete the project within the expected time-frame in a step-by-step manner.*

#### **➤ Focus on differentiating your project**

A business proposal is similar to a sales pitch. It is designed with the idea of persuading the client to hire you/your organization for a particular project over all other competitors. The proposal must highlight key points like:

1. The benefits of hiring you/your company.
2. Your/the company's core strengths that might prove beneficial for the project.
3. How you/the organization are better vis a vis other competitors.

The following steps may be followed while making a business proposal:

- a. Explain the existing problem or background of the situation that triggered the client's requirement.
- b. List out the goals of the proposal. These should be in sync with those listed in the RFP.
- c. The proposed methodology must be elaborated.
- d. The time required (stage-wise) and the cost incurred should be clearly indicated.

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- e. Competitive advantage that you/the company offer must be highlighted.
- f. The proposal may end by clearly highlighting how the client would benefit if they chose your proposal.

### ➤ **Proposal Writing**

At this stage, all the information must be collated and transformed into a proposal format. If the expected format has been specified in the RFP, the same must be adhered to.

### ➤ **Review and final touches**

The final stage deals with a close review of the entire proposal. This shall help check for any possible gaps or mistakes that might have occurred while making the proposal. All the relevant information must be presented in a logical format. The client's requirements and specifications should be met. A proofreading of the proposal can be done by a trusted team member or senior.

### **17.5.5 7Cs of Effective Business Proposals**

Effective communication is a significant part of business success. Good business communication requires 7Cs which can be used as a blueprint of effective communication. Following are the 7Cs of effective business proposals:

#### **Concise**

As people in business are hard pressed for time, it pays to get to the point quickly. Effective business proposals should use concise and direct language that gets the point across fully and in a way that encourages efficient action.

#### **Complete**

Plan your business proposal wisely so you get all of the information to your recipient the first time. If you leave out main information in your initial communication, it will cause a series of problems that will take time to repair.

#### **Conversational**

It is important to present your facts in a conversational tone that calls for an interaction, rather than an aggressive tone that can causes disagreement. Instead of being emotional, it is best to present the information in a manner which is professional.

#### **Clear**

In business communication, one gets only one chance to make their point. If your information is misinterpreted, you may not have the chance to correct it before it spirals into a problem. When you present your information in a business proposal, be sure to do so in a clear voice that permits every word to be understood.

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#### **Considerate**

The business proposal should keep in mind the reader's needs. It should address the reader's question: 'What is in it for me?'

#### **Confidence**

An air of confidence in the business proposal helps add credibility to your information. Presenting data with a clear and powerful tone indicates that you are well versed with the facts you have given in the business proposal and that the information being presented is valuable.

#### **Check**

Always check your data and facts before including it in a business proposal. If there is incorrect information in the proposal, the power of your ideas is lost.

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#### **Check Your Progress - 1**

1. A business proposal is:
  - a. An offer to provide a product or service
  - b. An amalgamation or merger
  - c. A new business venture
  - d. A liquidation process
  - e. A franchise job
2. A business proposal invited by the management from employees of the organization is an/a:
  - a. Internal unsolicited
  - b. Internal solicited
  - c. External solicited
  - d. External unsolicited
  - e. Memorandum
3. A business plan has / is
  - a. Broad report of the company and its future prospects
  - b. Quote a price and call for action
  - c. A sales document requesting a client to allocate the project
  - d. An external solicited proposal
  - e. Similar to a business proposal
4. An external solicited business proposal document consists of three parts:
  - a. Main document, statement of problem and statement of solution
  - b. Prefatory parts, main document and the supplementary section
  - c. Prefatory part, financial implication and budget
  - d. Prefatory, main document and financial implications
  - e. Problem statement, solution and conclusion

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5. Which of these proposals is riskier when it comes to its acceptance?
  - a. Internal solicited proposal
  - b. External unsolicited proposal
  - c. RFP
  - d. Internal unsolicited proposal
  - e. External solicited proposal
6. Which of these components of a solicited proposal describes the problem and how you intend to address it?
  - a. Body
  - b. Details of the solution
  - c. Text
  - d. Introduction
  - e. Executive summary
7. Which of the following is not a criterion in a business proposal?
  - a. Content and objective
  - b. Layout and aesthetics
  - c. Triads and alliterations
  - d. Grammar and vocabulary
  - e. Logical flow
8. Prefatory parts of the business proposal do not include which one of the following?
  - a. Title page
  - b. Cover letter
  - c. Statement of the job
  - d. Budget
  - e. Table of contents
9. This section of the proposal helps laymen to understand the technical terms used in the proposal.
  - a. References
  - b. Appendix
  - c. Index
  - d. Glossary
  - e. Introduction

### **Block-3: Formatting Letters And Writing Business Reports**

- 10 Internal proposals both solicited and unsolicited will be submitted within an organization. “The statement of problem” part
  - a. Explains current context of the problem and explains how the proposal can solve it
  - b. Includes the benefits that will be accrued if approved
  - c. Has the estimation of expenses
  - d. Captures the key points that emphasizes the significance of the proposal
  - e. Mentions the implications in the long run for the company’s growth prospects.

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## **17.6. Business Plans**

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A business plan is a document which provides a road-map on the functioning of the business. It includes promoting, funding and the target customers. It includes details of financial forecasts, expected revenue earnings, initial investment, working capital, measures adopted for raising investment and its periodicity.

### **17.6.1 Rationale for Business Plans**

A business plan will bring a realistic picture to the business which is to be initiated through facts and figures and accurate forecasts to convince the investors that the business is a feasible investment opportunity. It helps to chart the future of the business, create a broad strategy for the specific goals and objectives and deadlines to achieve them.

### **17.6.2 Contents of a Business Plan**

The following are the contents of a business plan:

*Cover page* – Name of the business, details of the person(s) who submitted the plan and date of submission.

*Table of contents* – A quick review of the document’s content.

*Executive summary* – A page’s description of the products/services offered by the company, location(s), objectives, mission, company staff, clients, budget, timelines, etc.

*Company summary* – Present status of the company, ownership details, and achievements till date, expertise and USP, details of services rendered to clients/customers.

*Market analysis* – The target market, size, trends, segmentation, the prospect of enhancing revenue, the main advantages the company has like potential clients and how the company is catering to their specific requirements, the services that meet the market needs, etc. and the competitors and their services.



## Unit 17: Writing Business Proposals and Business Plans

*Strategy and implementation summary* – Marketing strategy to derive the competitive edge, plans for promoting and advertising, sales planning and forecasting and SWOT.

*Management summary* – A brief account of the manpower in the company.

*Financial plan* – A realistic estimate for investment required (startup funding), expected profit and loss (income), projected cash flow statement, projected balance sheet, as well as break-even analysis which indicates when the business will become self-sufficient and solvent.

*Appendix* – Comprehensive tables of sales forecasts, personnel payroll, Profit and Loss, Cash Flow, and Balance Sheet, promotional materials, media publications, awards and any other essential proofs.

### **Exhibit 17.2 provides the commonly used sections for preparing and presenting a business plan.**

Here are the most commonly used business plan sections:

- Company description
- Products & Services
- SWOT Analysis
- Market Analysis
- Marketing Plan
- Financial Planning
- Funding Request

Source: <https://www.projectmanager.com/blog/write-an-executive-summary>, 2021

### **17.7. Summary**

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- A business proposal is a persuasive document that is designed to sell a product/service. It seeks approval, permission or funding from the reader /target audience for completing the proposed project. Proposals can be internal/external, long or short, solicited or unsolicited.

### **17.8. Glossary**

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**RFP:** Request for Proposal is a written invitation to vendors and submit a written offer to supply services.

**Solicited Proposal:** A solicited proposal sent is when the customer asks for a proposal. They may ask verbally or they may issue a written Request for Proposals (RFP).

### **Block-3: Formatting Letters And Writing Business Reports**

**Unsolicited Proposal:** An unsolicited proposal is initiated by you with a view to seeking business from a prospective buyer.

#### **17.9. Self-Assessment Test**

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1. What do you understand by business proposals?
2. Highlight the differences between business proposals, reports and business plans.
3. What are the different types of business proposals?
4. What are the guidelines for writing effective proposals? Explain the 5Ws and 1H formula for writing business proposals.
5. You are a leading nutritionist. You want to have a tie-up with a popular fast-food joint in providing nutritious and cost-effective food items to their customers. Write an external unsolicited proposal.

#### **17.10. Suggested Readings / Reference Materials**

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- eem524:524:s00:01/03/2021\_fc&utm\_source=newsletter&utm\_medium=Compass&utm\_campaign=eem524:524:s00:01/03/2021\_fc
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### 17.11 Answers to Check Your Progress Questions

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#### 1. (a) An offer to provide a product or service

A business proposal is an offer to provide a product or service on certain terms and conditions.

#### 2. (b) Internal solicited

When the management solicits its own employees (internal) to send a proposal.

#### 3. (a) Broad report of the company and its future prospects

A business plan is meant for attracting the attention of investors and financiers. It contains broad report of the company and its future prospects.

#### 4. (b) Prefatory parts, main document and the supplementary section

An external solicited business proposal document consists of three parts: Prefatory parts, Main document, and the Supplementary section.

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**5. (b) External unsolicited proposal**

Options (a) and (c) are from internal sources. Hence, risk is least or low. RFP is solicited. Hence you know the credentials of the vendor. Thus the riskier among all is (b).

**6. (d) Introduction**

Introduction part of the proposal states the problem and the solution therefor.

**7. (c) Triads and alliterations**

These are basically beautification of the draft using some 'figures of speech' which is obviously not the purpose of submitting a business proposal.

**8. (d) Budget**

The rest of the options are the parts of the prefatory part of a business proposal, whereas budget for the proposal finds its place in the main document.

**9. (d) Glossary**

The very purpose of glossary is to explain the technical terms used in the proposal, so that every concerned person understands, particularly when they are not technical guys.

**10. (a) Explains current context of the problem and explains how the proposal can solve it**

All the other options belong to the other structure of the internal business proposal.

## Unit 18

# Writing the Report

### Structure

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- 18.1 Introduction
- 18.2 Objectives
- 18.3 Different Types of Reports
- 18.4 Four Steps in Writing a Report
- 18.5 Structuring the Report
- 18.6 Concluding the Report
- 18.7 Summary
- 18.8 Glossary
- 18.9 Self-Assessment Test
- 18.10 Suggested Readings/Reference Materials
- 18.11 Answers to Check Your Progress Questions

### 18.1 Introduction

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The previous unit introduced the elements of a report and detailed how the text of a report should be crafted to make it clear and convenient for the reader to comprehend. This unit explains various aspects of writing report.

Reports (as mentioned in the previous unit) are business tools that assist managerial decision-making and problem-solving. Reports can be classified on the basis of form, direction, functional use and content. There are four steps in writing a report. Informational reports are structured on the basis of importance, sequence, chronology, spatial orientation and category of sub-topics. Analytical reports are structured using hypothesis and relative merit.

Reports usually end with a conclusion or recommendation depending on the nature of the report.

This unit explains the various types of reports and the four steps involved in writing a report. It also shows how to structure a report, and how to generate conclusions and recommendations at the end of a report.

### 18.2 Objectives

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After studying this unit, you will be able to:

- Discuss different types of reports for assisting managerial decisions
- Illustrate the four steps in writing a report for explaining the scope of a report

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- Illustrate how to structure a report for organizing a report
- State the importance of conclusions/recommendations of a report to understand the essence of report

### **18.3 Different Types of Reports**

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Reports can be classified on the basis of form, direction, functional use, and content. The following brief review of classification helps explain the scope of reporting and establishes a departure point for studying reports and reporting.

#### **Formal or Informal Reports**

Formal reports are carefully structured. They stress on objectivity and organization, contain a lot of details, and tend to eliminate such elements as personal pronouns.

Informal reports have casual usage of words, mostly quite short ones.

#### **Short or Long Reports**

This classification is based on the size of the report.

#### **Informational or Analytical Reports**

Annual reports, monthly financial reports, reports on personnel absenteeism etc. are called informational reports meant for both internal and external purposes.

Analytical reports are prepared after some research relating to the problem to be addressed, indicating the outcome of the research/study.

#### **Activity 18.1**

You are the production manager of a company and want to share the performance of the department with other members of the organization. You have prepared text that runs to about eight pages. What kind of report will you use to share the information?

**Answer:**

#### **The Proposal Report**

A proposal is submitted with a view to finding solution to a problem or issue. For example, government / or quasi government agencies call for “request for proposals”, called RFP wherein certain job to be carried out is drafted along with how the vendor would like to execute the work therein.

### Vertical or Lateral Reports

Reports that move up or down the hierarchy are referred to as vertical reports. Such reports contribute to management control. Lateral reports, on the other hand, assist in coordination within the organization. A report travelling between units of the same organization level is a Lateral Report.

### Internal or External Reports

Internal reports are for the internal consumption of the concerned authorities. Whereas external reports, for example, annual reports of companies, are meant for the stake-holders like investors, suppliers, financiers etc.

### Periodic Reports

Periodic reports are prepared and submitted at regular intervals, particularly for the consumption for higher authorities. For example, the General Manager (Business Development) calls for weekly reports on the growth of deposits under certain important heads.

### Functional Reports

Reports submitted by various functional areas like: accounting, finance, stores, sales, human resource etc. They could be different ways of preparing the functional reports as listed below:

- a. **Printed format:** A standard template is prepared. The data is updated and submitted as per the schedule of submission.
- b. **Letter form:** When the reports are meant for outsiders, letter form is preferred. It follows the usual parts of a letter in addition to providing headings, tables, figures and footnote.
- c. **Memo:** When the information to be shared is informal and within the organization, memos are preferred. Usually, they are brief and simple.
- d. **Manuscript:** When a formal report needs to be prepared running into many pages, manuscripts are used.

Having seen the different formats of reports, let us understand the process of writing a good report.

#### Requisites of Good Report Writing

Some tips on writing a good report are listed here:

1. Identify your objective, i.e., be focused.
2. Analyze the forte audience, analyze your target audience and what they want to see in the report and its implications thereof.
3. Decide how long your report should be
4. Release correct and true information in a report.

*Contd. ....*

### **Block-3: Formatting Letters And Writing Business Reports**

5. Deliberate all sides of the problem reasonably and impartially. Include all relevant facts in a report.
6. Deliberate on the report structure and matter. Pre-decide the report writing style.
7. Embolden response on the report from the criticizers. Their feedback, might be useful if properly supported with reasons by the critics. The report can be adapted based on such feedback.
8. Use graphs, pie-charts, etc. to show the statistical data records over years.
9. Choose on the margins on a report. Ideally, the top and the side margins should be the same (minimum 1 inch broad), but the lower/bottom margins can be one and a half times as broad as others.
10. Try to create reader's curiosity by making appropriate paragraphs, giving bold headings for each paragraph, using bullets wherever required, etc.

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#### **Check Your Progress - 1**

1. What type of reports travel within an organization?
  - a. Internal reports
  - b. External reports
  - c. Annual reports
  - d. Letter reports
  - e. Analytical reports
2. \_\_\_\_\_ reports are carefully structured. They stress on objectivity and organization, contain much details, and are written in a style that tends to eliminate such elements as personal pronouns.
  - a. Informal
  - b. Formal
  - c. Internal
  - d. External
  - e. Letter reports
3. The \_\_\_\_\_ can generally be described as an informal report.
  - a. Internal memorandum
  - b. External memorandum
  - c. Long report
  - d. Internal report
  - e. Letter report



4. Annual reports, monthly financial reports, reports on personnel absenteeism are called \_\_\_\_\_.
  - a. Analytical reports
  - b. Informational reports
  - c. Lateral reports
  - d. External reports
  - e. Long reports
5. The proposal report is a variation of a/an \_\_\_\_\_.
  - a. Informal report
  - b. Informational report
  - c. Problem-solving report
  - d. Formal report
  - e. Letter report

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#### 18.4 Four Steps in Writing a Report

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Writing a report requires careful planning. Although there is a great variety in subject matter, audience needs, and types of reports, the following four steps lay the foundation for any report:

- Defining the problem and the purpose.
- Identifying and organizing the issues for investigation.
- Conducting research.
- Analyzing and interpreting data, drawing conclusions, and developing recommendations.

The relative importance of these steps varies with the type of assignment. Informational reports, which contain facts alone, may require very little in the way of conclusions and recommendations. Examples of such reports are monitor/control reports and statements of policies and procedures. On the other hand, analytical reports include collection and analysis of data and arrive at conclusions and suggest recommendations and require all the steps mentioned above.

##### **Defining the Problem and the Purpose**

Research studies often have the statement of both the problem and the purpose. While the problem speaks about the very objective of the study, the purpose determines the elements to be considered for finding out the answer. Once the

### **Block-3: Formatting Letters And Writing Business Reports**

writer arrives at the answer to why and what questions, he/she will be able to progress towards solving the problem.

#### **Zeroing in on the Problem**

To determine the precise nature of the problem, the report assignment can be explored using the following questions:

- What needs to be determined?
- Why is the issue important?
- Who is involved in the situation?
- Where is the trouble located?
- When did it start?
- How did the situation originate?

These questions may not be applicable to all situations, but asking them helps the writer clarify the boundaries of his/her investigation. The writer can then draft a written statement of the problem being investigated. This will serve as a guide to what he/she is trying to solve or what question he/she is trying to answer in the report.

#### **Developing the Statement of Purpose**

Once the writer has asked some preliminary questions and determined the problem, he/she can write a clear statement of purpose that will define the objective of the report. In contrast to the statement of problem, which defines only what the writer is going to find out, the purpose directs what the report should achieve.

In informational reports, the purpose could be stated as “To find out if the salaries of support staff are competitive, consistent and comparable with that of our competitors.”

In the case of analytical report, the writer might prefer to say, “to estimate the difference between salaries of our support staff and that of our competitors and analyze its effect on their output and further suggest ways to palliate the negative effect.”

#### **Identifying Issues for Investigation**

Once the problem has been defined and the purpose of the study established, the writer can begin the investigation. To do that, he/she has to first identify the areas that need to be investigated. This he/she can do by breaking down the “purpose” into its related aspects.

**Activity 18.2**

You are required to present a report on “Family-owned businesses in India.” Decide on the type of the report and the structure for your presentation and write about it.

**Answer:**

Detailing on both the problem and purpose would depend on the complexity of the problem or the issue. This perhaps is only a part of the task, major task being the presentation thereof persuasively and clearly to the readers.

### 18.5 Structuring the Report

Since reports can be structured in a number of (different) ways, the writer should identify the most suitable structure for the report on the basis of the “purpose” of study. We have already seen that the purposes are different for informational and analytical ones.

Exhibit 18.1 explains the commonly used structure of a report.

#### Exhibit 18.1: Structure of a report

There is no one standard format for business reports. They are framed as per the assignment instructions. If no instructions are not outlined the commonly used sections of a report are:

- Executive Summary
- Introduction
- Discussion or analysis
- Conclusions
- Recommendations
- Other sections
- Business report pre-submission checklist

Business reports also include a reference list, title page, table of contents, and/or appendices.

*Source:*

<https://owll.massey.ac.nz/assignment-types/business-report-structure.php> 10 March, 2020

### **Block-3: Formatting Letters And Writing Business Reports**

Many assignments require both information and analysis, so it is up to the writer to determine the overall purpose of the study. If the writer's intention is limited to providing background information that someone else will use and interpret, then an informational outline is suitable, but subsections of the study may require some analysis to discover and emphasize important facts. If the purpose of the study is to scrutinize the data and draw own conclusions and make recommendations, then an analytical outline is suitable for the report, even though the opinions will be based on facts. For problem-solving, one may use a variety of structural schemes, as long as one can avoid errors in logical reasoning.

#### **Informational Assignments**

Studies that lead to factual reports that offer little scope for analysis or interpretation of data, are generally structured on the basis of sub-topics dealing with specific subjects.

These sub-topics can be arranged in various ways according to importance, sequence, chronology, spatial orientation, and category.

These structures are not watertight compartments: a topic organized by category can also be structured by chronology within a larger category. An approach that conveys the subject most clearly, logically, and forcefully to the readers should be chosen.

#### **Analytical Assignments**

Analytical studies usually contain analyses, conclusions, and recommendations. These studies generally follow a problem-solving method. The two most common structural methods are: 1) Hypothesis and 2) Relative merit.

*Hypothesis:* When the report's purpose is to find out causes, predict results, or suggest a solution to a problem, one way to proceed is to formulate hypothetical explanations for the topics under study. It may be essential to ensure that these explanations are supported either by theoretical underpinnings or by intuitive explanation, which can be comprehended easily. The problem can then be analyzed by speculating on the reasons. After researching the issue, the report is organized so that the writer can prove or disprove each reason.

*Relative merit:* When the assignment involves evaluating how well various alternatives meet the writer's criteria, the natural way to structure the analysis is to focus on the criteria.

Such subjects will be presented more clearly and persuasively if organized according to the criteria used for selection. Another way of using relative merits is to identify the alternatives first and then analyze how well each alternative meets the writer's criteria.

Thus, the writer has to organize the report in the way that best suits the writing situation. These various report structures are only intended to guide the writer who might blend various patterns depending on his/her needs.

**Basic aspects of report writing.**

Report writing at all business levels is an essential capacity. A well-written and effective report can drive sales, create more cohesive and functioning teams, streamline processes and improve financial operations. Reports can alert management to business growth opportunities, identify areas where greater efficiency can be achieved and set up intelligible business measures.

**Considerations**

Important attentions include knowing the audience for whom and why the report is being written. It is vivacious to determine the number of business resources that will go in to the writing of the report and to compare the value of these resources to the financial gain proposed. Sometimes a less time-consuming form of business communication, such as a memo, could be considered instead of a report.

**Planning**

Planning is essential to effective business communication. An all-inclusive plan for writing a report includes the timeline for making of the report, a list of all contributors and all essential indemnity supplies and materials, such as artwork.

**Production**

Depending on the scope of the report, it may take as less as a day to as long as a month to draft a proper report. It is important to check the plan periodically during long report-writing projects to ensure that the project is going as per schedule.

**Review**

A minimal responsibility is that the writer reviews the report before dispatching. Besides content review, other prime requisites would be grammar, spelling and punctuation. It is suggested to have a third person proofread the report before it's publicized.

**Delivery**

Reports can be presented on a slide show, or discussion, printed and emailed in whole to recipients or divided into several sections and delivered over several weeks to different recipients.

It may be a good idea to send a brief write up of the main report, while the main report could be provided in hard copy.

**Check Your Progress - 2**

6. Before writing a report the writer must \_\_\_\_\_ of his investigation by defining the problem.
  - a. Conclude the process
  - b. Narrow the focus
  - c. Broaden the scope
  - d. Appreciate the importance
  - e. Find solutions to the problems
7. In informational reports, sub-topics can be arranged in a variety of ways EXCEPT:
  - a. Sequence
  - b. Chronology
  - c. Spatial orientation
  - d. Imagination
  - e. Topic order
8. Analytical reports generally follow a problem-solving method. Which problem-solving method is not followed?
  - a. Hypothesis
  - b. Relative merit
  - c. Relative demerit
  - d. Content analysis
  - e. Conclusions
9. When a report's purpose is to discover causes, predict results or suggest a solution to a problem, one way to proceed is to formulate \_\_\_\_\_ explanations.
  - a. Hypothetical
  - b. Unbelievable
  - c. Problem-solving
  - d. Speculate
  - e. Organize
10. The conclusion of the analytical report contains:
  - i. The key findings of the report
  - ii. The writer's analysis of what the findings mean
  - iii. Opinions about the course of action that should be taken
  - a. ii only
  - b. i only
  - c. i & iii

- d. i, ii & iii
- e. ii and iii only

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### 18.6 Concluding the Report

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A report usually ends with conclusions and/or recommendations based on the evidence gathered over the course of the investigation. So, while starting the investigation, the writer should have an idea on the way the report is likely to end.

A “conclusion” is a logical interpretation of what the facts in the report mean. This interpretation cannot be based on information which is not mentioned in the report. All the conclusions must be derived from the facts and information contained in the report. A ‘recommendation’ is a suggestion offered based on the conclusions to the concerned for action. Sometimes it may be inappropriate for the writer to append recommendations when it is not expected to do so. The difference between the two is worth-noting.

Recommendations must be based on logical analysis and sound conclusions. The writer has to make sure that the recommendations are detailed clearly so that the readers know exactly what to do with them.

To summarize, report writing involves identifying the problem and purpose, investigating the issue, structuring the material, and ending with conclusions and/or specific recommendations.

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### 18.7 Summary

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- Reports are classified into various types depending on their form, direction of movement, functional use, and the content of the report.
- The steps in writing a report involve: 1) Defining the problem and the purpose 2) Zeroing in on the problem 3) Developing the statement of the purpose and 4) Identifying issues for investigation.
- Informational reports are structured on the basis of importance, sequence, chronology, spatial orientation, and category of subtopics.
- Analytical reports are structured using 1) Hypothesis and 2) Relative Merit.
- Reports end with a conclusion or a recommendation depending on the nature of the report.

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### 18.8 Glossary

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**External Reports:** External reports, such as annual reports of companies, are prepared for distribution outside the organization.

### **Block-3: Formatting Letters And Writing Business Reports**

**Formal Reports:** Formal reports are carefully structured. They stress objectivity and organization, contain a lot of details, and tend to eliminate such elements as personal pronouns.

**Internal Reports:** Internal reports move within the organisation.

**Lateral Reports:** Lateral reports assist in coordination within the organization. A report travelling between units of the same organization level is a lateral report.

**Periodic Reports:** Periodic reports are issued on regularly scheduled dates. They are generally upward directed and serve management control.

**Proposal Report:** The proposal report is a variation of the problem-solving report. A proposal report is a document prepared to describe how one organization can meet the needs of another.

### **18.9 Self-Assessment Test**

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1. Reports are business tools that convey information useful for managerial decision-making. They are classified into different types depending on several parameters. What are the different classifications of reports and the basis of their classification?
2. Writing a report is highly influenced by the audience needs and subject matter. Though there are a variety of ways in which reports can be written, what are the common steps that followed in report writing?
3. The results of investigation have to be structured and presented suitably in a report. What are the different ways in which reports can be structured? Also write about the basis for structuring a report.

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**18.11 Answers to Check Your Progress Questions**

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**1. (a) Internal reports**

Internal reports, as the name suggests, travel within an organization.

**2. (b) Formal**

Formal reports are carefully structured. They stress objectivity and organization, contain much detail, and are written in a style that tends to eliminate such elements as personal pronouns. Informal reports are usually short messages with natural, casual use of language. The

### **Block-3: Formatting Letters And Writing Business Reports**

internal memorandum can generally be described as an informal report.

#### **3. (a) Internal memorandum**

Informal reports are usually short messages with natural, casual use of language. The internal memorandum can generally be described as an informal report.

#### **4. (b) Informational reports**

Informational reports carry objective information from one area of an organization to another. Annual reports, monthly financial reports, and reports on personnel absenteeism are types of informational reports.

#### **5. (c) Problem-solving report**

The proposal is a variation of problem-solving reports. A proposal is a document prepared to describe how one organization can meet the needs of another. Most governmental agencies advertise their needs by issuing “requests for proposal,” or RFPs.

#### **6. (b) Narrow the focus**

The writer must narrow the focus to arrive at a manageable topic. Defining the problem in clear, specific terms can narrow the focus.

#### **7. (d) Imagination**

Reports have to be organized systematically. They cannot be arranged according to the imagination.

#### **8. (c) Relative demerit**

Relative demerit is not used. Report writers analyze the relative merits, not relative demerits.

#### **9. (a) Hypothetical**

When the report’s purpose is to discover causes, predict results, or suggest a solution to a problem, one way to proceed is to formulate hypothetical explanations. If your problem were to determine why your company is having trouble hiring secretaries, you’d begin analyzing this problem by speculating on the reasons. Then after researching the issue, you would organize your report so that you could prove or disprove each reason.

#### **10. (a) The writer’s analysis of what the findings mean**

The conclusion of the analytical report contains the writer’s analysis of what the findings mean. The very objective of analytical report is to provide an explanation for the problems hypothesized or identified using relevant data. The findings have to be linked to these aspects and interpret accordingly.

## Unit 19

# Presenting Data using Visual Aids in Reports

### Structure

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- 19.1 Introduction
- 19.2 Objectives
- 19.3 Role and Importance of Visual Aids
- 19.4 Types of Visual Aids
- 19.5 Selecting a Suitable Visual Aid
- 19.6 Introducing Visual Aids in the Text
- 19.7 Summary
- 19.8 Glossary
- 19.9 Self-Assessment Test
- 19.10 Suggested Readings/Reference Material
- 19.11 Answers to Check Your Progress Questions

### 19.1 Introduction

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The previous unit explained the various types of reports and the four steps involved in writing a report. It also showed how to structure a report, and how to generate conclusions and recommendations at the end of a report

A report's success depends not only on how well the writer has accessed information through research, but also on how well he/she has presented it. What techniques writers can use to make the data comprehensible or how the writer can make important points stand out and complex data easy to understand are the questions one faces—while writing a report.

Visual aids in a presentation help to communicate the subject matter clearly. A graph or table is easier for the audience to understand as compared to a paragraph. Visual aids clarify and simplify data. It can also be used to emphasize important material and consequently, to persuade the reader to come around to the writer's point of view.

This unit explains the role and importance of visual aids in presenting data, and lists the various types of visual aids that can be used. It also shows how visual aids can be incorporated in text to make it easier to understand.

### 19.2 Objectives

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After studying this unit, you will be able to:

- Explain the role and importance of visual aids in presenting the data clearly

### Block-3: Formatting Letters And Writing Business Reports

- Identify the various types of visual aids for picking appropriate visual aid the most suitable visual aid
- Illustrate how to incorporate visual aids in data for adding meaning to the visual aids

#### 19.3 The Role and Importance of Visual Aids

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The success of writing a report is achieved when the contents are easily read, comprehended, remembered and retrieved. This depends on how well the report is presented. Visual aids are used in a presentation to communicate the subject matter clearly. A graph or table or a picture is easier for the audience to understand as compared to running matter.

Visual aids clarify and simplify data. For instance, if a company's share of sales and its competitor's share of sales per region are tabulated or presented graphically, the audience would understand it more easily than presenting in the form of a running text. Visual aids thus clarify and simplify data. They can also be used to emphasize important material, and consequently to persuade the reader to come around to the writer's point of view.

Wherever there is a need to summarize, reinforce, attract, impress, and unify the content of the presentation, particularly when numerical data is presented, visual aids are extensively used. However, visual aids should not be overused as they could distract readers and break the continuity of the main argument of the report. Exhibit 19.1 describes various advantages of visual aids.

##### Exhibit 19.1: Advantages of Visual Aids

A picture is worth a thousand words. Using visual aids in presentations helps in many ways. Some of the advantages of visual aids are:

- Help in retention of information long-term.
- Understand things faster
- More enjoyable, interactive, and memorable
- Connect with audience and relate with you better
- Less likely to be misunderstood or misrepresented.
- Very useful for people with learning disabilities
- Help in keeping track of what the presenter is saying

Source: <https://www.orai.com/blog/visual-aids-in-presentation/> August 21, 2020

## 19.4 Types of Visual Aids

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In reports, the most commonly used visual aids are:

- Tables
- Line charts
- Bar charts
- Gantt charts
- Pie charts
- Pictograms
- Maps, and
- Flowcharts

The characteristics of these visual aids are discussed in the subsequent sections.

---

### **Check Your Progress - 1**

1. Visual aids are used to \_\_\_\_\_ the material.
  - a. Clarify
  - b. Weaken
  - c. Undermine
  - d. Distract
  - e. Break the continuity

---

## 19.5 Selecting a Suitable Visual Aid

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This section deals with characteristics of various visual aids, which help in picking up the proper visual aid.

### **Tables**

Tables can be used for presenting detailed, numerical information. They are ideal when the audience needs to know all the facts, when it would be either difficult or cumbersome to include the information in the main text. Tables are made up of vertical columns and horizontal rows, with headings along the top and side.

### **Line Charts**

Line charts are useful in cases that need depiction of changes in data over time. They are also useful in illustrating trends. Unlike bar charts, which show only

### Block-3: Formatting Letters And Writing Business Reports

the total amount for a time period, line charts show variations within each time period. It is advisable to use the horizontal axis for time and the vertical axis for amounts.

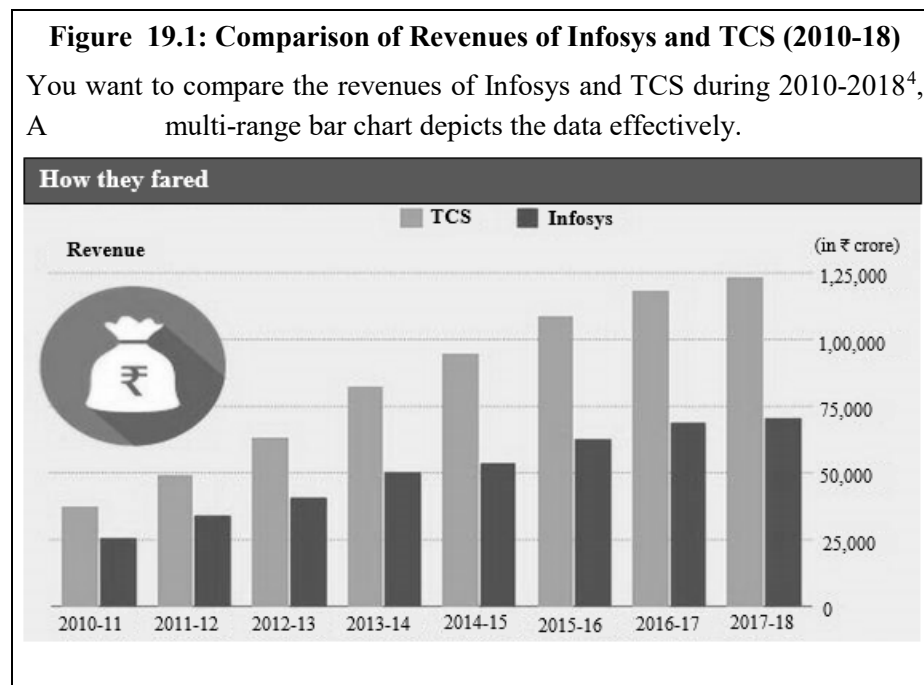
Area charts, also called cumulative line charts or surface charts, are similar to component bar charts, because they show how different factors contribute to the total. The area chart is especially useful to illustrate changes in these components over time.

#### Bar Charts

**Simple bar chart:** The simple bar chart is an effective graphic representation for quantities. The length of the bars, either horizontal or vertical, indicates quantity.

**Multi-range bar chart:** The multiple-range bar chart, also called the comparative or cluster bar chart, is useful for expressing data that change over time. The multiple-range bar chart is especially effective in comparing more than one quantity (set of data) at each point along the x-axis.

Figure 19.1 depicts presentation through multi-bar charts.



Source: Prepared by ICFAI Research Team using data from the open sources

**Stacked-bar chart:** The stacked-bar chart also called component or segmented bar chart, is used to show how different components contribute to a total figure. This chart is particularly useful when components for more than one time period are being compared.

<sup>4</sup> <https://www.thehindubusinessline.com/info-tech/all-things-equal-how-did-tcs-hurtle-past-infosys/article24476930.ece>

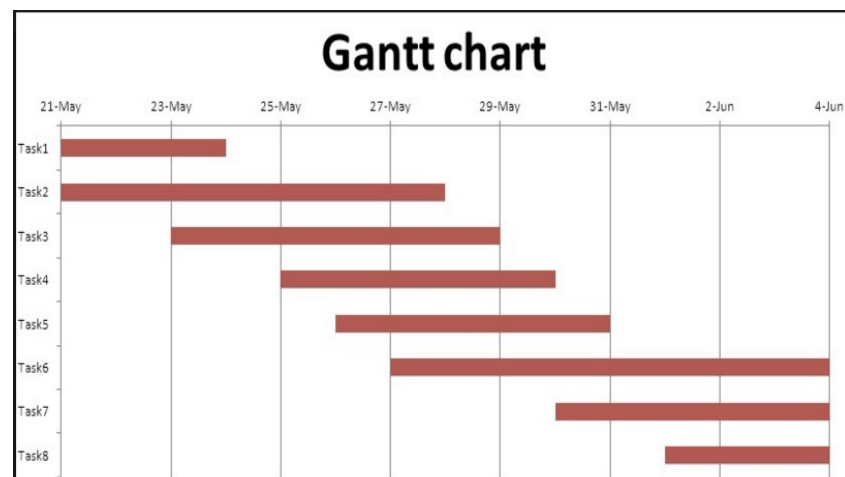
### Gantt Chart

A Gantt chart is a horizontal bar chart that graphically displays time relationships. Time is displayed on the horizontal axis and tasks are shown on the vertical axis. The length of the bars depicts the amount of time each task takes.

Gantt charts provide a method for determining the sequence and particular actions that need to be taken to achieve a given objective. In complex operations, they prove to be a useful tool for managers in planning, allocating, and scheduling resources. They are especially useful in scheduling because any gaps in a schedule show up clearly. When managers face complex situations that require numerous resources over a period of time, and if the operations have more than one phase, a Gantt chart can be highly beneficial.

The following Figure 19.2 displays the scheduling of tasks<sup>5</sup> through Gantt Chart.

**Figure 19.2: Gantt Chart**



Source: ICFAI Research Center

### Pie Charts

Like stacked-bar charts and area charts, pie charts show how the parts of a whole are distributed. The whole is represented as a pie, with the parts becoming slices of the pie. Pie charts are effective for showing percentages (parts of a whole), but they are ineffective in showing quantitative totals or comparisons.

### Pictograms

A pictogram uses pictures to illustrate a numerical relationship. For example, coins<sup>6</sup> can be used instead of the bars in a simple bar chart to depict additions

<sup>5</sup> <https://appfluence.com/productivity/gantt-chart-in-excel/>

<sup>6</sup> <https://www.motionelements.com/stock-video-11548342-shrinking-bar-chart-made-of-coin-stacks-business-decline-or-decreasing-savings>

### **Block-3: Formatting Letters And Writing Business Reports**

to personal savings. Pictograms can be dramatic but can lose their meaning if they are not planned properly.

#### **Maps**

Maps help readers visualize geographic relationships and are especially useful when the reader is not familiar with the topography being discussed. A map can, for example, show the location of the home office, distribution centers, and retail stores within a geographic region. A map helps to get around the difficulty of having to explain the information in words. For example, you want to describe the various places at which TCS is operating in India.<sup>7</sup> Instead of giving a descriptive names of the place, a map given below speaks much more.

#### **Flowcharts and Organization Charts**

Flowcharts or organization charts are used to depict physical or conceptual relationships rather than numerical ones. Flowcharts are indispensable when illustrating processes, procedures, and relationships.

An organization chart illustrates the positions, units, or functions of an organization and the way they are interrelated.

---

#### **Check Your Progress - 2**

2. Pie charts show how the parts of a whole are \_\_\_\_\_.
  - a. Disrupted
  - b. Distorted
  - c. Disturbed
  - d. Distributed
  - e. Disconnected
3. Pie charts are effective for showing percentages, but they are ineffective in showing \_\_\_\_\_ totals or comparisons.
  - a. Quantitative
  - b. Qualitative
  - c. Queer
  - d. Analytical
  - e. Comparative
4. A pictogram uses \_\_\_\_\_ to illustrate numerical relationships.
  - a. Pictures
  - b. Pickets

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<sup>7</sup> <https://business.mapsofindia.com/software-companies-india/tata-consultancy-services.html>



- c. Photos
  - d. Particulars
  - e. Places
5. An organization chart does not illustrate the \_\_\_\_\_.
- a. Positions of an organization
  - b. Units of an organization
  - c. Functions of an organization
  - d. Market places of an organization
  - e. Financial structure of organization
6. The multi-range bar chart is useful for expressing data that will \_\_\_\_\_ over time.
- i. Change
  - ii. Revert
  - iii. Turn
- a. i only
  - b. ii only
  - c. i & iii
  - d. ii & iii
  - e. i and ii
7. The stacked-bar chart is also called the \_\_\_\_\_.
- i. Component bar chart
  - ii. 100 per cent bar chart
  - iii. Segmented bar chart
- a. i only
  - b. i & ii
  - c. i & iii
  - d. i, ii & iii
  - e. ii and iii

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## 19.6 Introducing Visual Aids in the Text

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As mentioned earlier in the chapter, visual aids supplement the text, while the text adds meaning to the visual aid. The two are complementary in the communication process. The illustrations make understanding the text easier.

### Block-3: Formatting Letters And Writing Business Reports

On the other hand, the text can direct the readers' attention to that aspect of the illustration that the writer wishes them to take special note of. Visual aids have to be introduced and interpreted by the text to ensure that they are clear to readers. This is also referred to as "integration" of the visual within the text.

#### Activity 19.1

You are the finance manager of a company. You are required to make a report on the budgeted vs. actual expenses of various departments of the organization. What type of visual aid will you use?

**Answer:**


#### Activity 19.2

The production manager of a company has been asked to make a presentation about the inventory turnover of various quarters of the last and current financial years. Which visual aid should he/she use in the presentation?

**Answer:**


---

### Check Your Progress - 3

8. In a report, a visual aid must be \_\_\_\_\_.
- i. Introduced in the text
  - ii. Integrated into the text
  - iii. Inverted in the text
- a. i only
  - b. iii only
  - c. i & ii
  - d. ii & iii
  - e. i and iii only

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9. Illustrative material in a report only \_\_\_\_\_ the text, it does not replace it.
- Supplements
  - Positions
  - Suspends
  - Superscribes
  - Sequences
10. A visual aid in a report should \_\_\_\_\_ the reader.
- Assist
  - Subsist
  - Alter
- i only
  - i & ii
  - ii & iii
  - iii only
  - ii only

---

### 19.7 Summary

- Visual aids are illustrations in tabular, graphic, schematic, or pictorial forms.
- They are used to make verbal messages simple and clear and enhance the effectiveness of a presentation.
- Tables are used for presenting detailed specific information.
- Line, bar, and pie charts are used to represent trends and numerical relationships.
- Flowcharts are used to represent a sequence of events.

### 19.8 Glossary

**Bar Chart:** The simple bar chart is an effective graphic representation for quantities.

**Flowchart:** Flowcharts or organization charts are used to depict physical or conceptual relationships rather than numerical ones. Flowcharts are indispensable when illustrating processes, procedures, and relationships.

### **Block-3: Formatting Letters And Writing Business Reports**

**Gantt Chart:** A Gantt chart is a horizontal bar chart that graphically displays time relationships. Time is displayed on the horizontal axis and tasks are shown on the vertical axis. The length of the bars depicts the amount of time each task takes.

**Line Charts:** Line charts are useful in cases that need depiction of changes in data over time. They are also useful in illustrating trends. Line charts show variations within each time period.

**Organisation Charts:** Organization charts are used to depict physical or conceptual relationships rather than numerical ones. An organization chart illustrates the positions, units, or functions of an organization and the way they are interrelated.

**Pictograms:** A pictogram uses pictures to illustrate a numerical relationship. For example, coins can be used instead of the bars in a simple bar chart to depict additions to personal savings.

**Pie Charts:** Pie charts show how the parts of a whole are distributed. The whole is represented as a pie, with the parts becoming slices of the pie.

**Stacked-Bar Chart:** The stacked-bar chart also called component or segmented bar chart, is used to show how different components contribute to a total figure. This chart is particularly useful when components for more than one time period are being compared.

**Visual Aids:** Visual aids are illustrations in tabular, graphic, schematic, or pictorial forms. They are used to make verbal messages simple and clear and enhance the effectiveness of a presentation.

### **19.9 Self-Assessment Test**

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1. How information is presented plays a crucial role in the success of a report. How can the writer emphasize the main points and make complex data easy to understand?
2. Visual aids can be used to clarify, simplify, reinforce, and emphasize the material in a report. What are the different visual aids that can be used to achieve the above objectives?
3. Visual aids supplement the text in a report while the text adds meaning to the visual aid. What is the significance of integrating the visuals with the text?

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### Block-3: Formatting Letters And Writing Business Reports

ging%20Stress%20and%20Emotions%20When%20Working%20Remotely&utm\_campaign=Enews%20Gen%2012/16/20%20Top%202020

#### 19.11 Answers to Check Your Progress Questions

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**1. (a) Clarify**

Visual aids clarify or simplify the material; they do not undermine it.

**2. (d) Distributed**

Pie charts show how the parts of a whole are distributed. As the name indicates, the whole is represented as a pie, with the parts becoming slices of the pie.

**3. (a) i only**

Pie charts are effective for showing percentages (parts of a whole), but they are ineffective in showing quantitative totals or comparisons. Bars are used for those purposes.

**4. (a) Pictures**

A pictogram uses pictures to illustrate numerical relationships. For example, in place of a simple bar chart, coins can be used instead of bars to depict additions to personal savings.

**5. (d) Market places of an organization**

An organization chart illustrates the positions, units, or functions of an organization and the way they inter-relate but does not depict the market places of an organization.

**6. (a) i only**

The multi-range bar chart (also called the multiple-range bar chart, comparative bar chart or cluster bar chart) is useful for expressing data that change over time. Data changes but does not turn over or revert.

**7. (d) i, ii & iii**

The stacked-bar chart is also called the component, 100 per cent, or segmented bar chart. When you want to show how different facts (components) contribute to a total figure, the stacked-bar chart is desirable. This graphic is particularly useful when components for more than one time period are being compared.

**8. (c) i & ii**

Visual aids have to be introduced and integrated into the text.

**9. (a) Supplements**

Illustrative material in a report only supplements the text, it does not replace it. So, exercise your judgment when using visual aids.

**10. (a) i only**

The visual must contribute to the reader's overall understanding of the text. In other words, it should assist the reader.

## Unit 20

### Review of Writing Skills

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#### Structure

- 20.1 Introduction
- 20.2 Objectives
- 20.3 Sentence Structure
- 20.4 Punctuation
- 20.5 Paragraphs
- 20.6 Compositions
- 20.7 Summary
- 20.8 Glossary
- 20.9 Self-Assessment Test
- 20.10 Suggested Readings/Reference Materials
- 20.11 Answers to Check Your Progress Questions

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#### 20.1 Introduction

The previous unit explained the role and importance of visual aids in presenting data, and the various types of visual aids that can be used were listed out. It also discussed how visual aids can be incorporated in text to make it easier to understand. This unit is on writing skills.

Writing skills are important for a manager, as he/she has to manage a large amount of communication within and outside of the organization. A sentence is a basic unit of any written text.

A sentence is a group of words so arranged as to convey a meaning. The words in a sentence should therefore, have a recognizable relationship with each other to be able to convey some meaning. To make sense, the sentence should have a proper structure and should adhere to the rules of grammar.

This unit shows a few basics of structuring a sentence, the role of punctuation in conveying the meaning of a sentence, logical grouping of sentences to make a coherent paragraph and the various steps in writing an essay.

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#### 20.2 Objectives

After studying this unit, you will be able to:

- Explain the importance of good writing skills for a manager to communicate effectively
- List the basics of sentence structuring for making coherent paragraphs

### Block-3: Formatting Letters And Writing Business Reports

- Illustrate the role of punctuation marks for bringing clarity in a sentence
- Identify the steps in writing an essay for making meaningful essay

#### 20.3 Sentence Structure

A sentence can broadly be divided into two parts: the subject and the predicate. The subject identifies things, while the predicate describes an action involving the subject. *Eg: The sun (subject) shines (predicate).*

Now, each word in these sentences has its own function in contributing to the overall meaning of the sentence. Depending on these functions, a sentence has different parts of speech or word classes. We will look at a few basic points that will help us to avoid making the errors that are commonly encountered in business writing.

1. State the subject of each sentence, unless it is an imperative sentence (e.g. *Drop that book*), where the subject (you) is understood and therefore left out.
2. Keep to the normal subject-verb-complement sequence to the extent possible.

<u>We</u>	<u>opposed the move</u>	<u>for three reasons.</u>
Subject	Verb	Complement

3. Do not put unrelated ideas in the same sentence.

*My dog needs a haircut and the old lady living next door wears false teeth.*  
*Here dog needing haircut and lady wearing false teeth are unrelated ideas.*

##### Activity 20.1

Identify the misplaced modifier in the following statement and rephrase the sentence to make it meaningful. *I came to enjoy flying over the hills.*

**Answer:**

These ideas have little in common and should certainly not be put together in the same sentence.

4. Pronouns, adverbs, phrases, and clauses should be placed near the words they modify.

Misplaced modifiers, which appear to modify a wrong referent, pose a common problem in writing.



Let us look at an example:

Sentence	Meaning
A. I only eat fish.	I only eat fish. I don't play basketball with it.
B. I eat only fish.	I eat only fish. Nothing else.
C. Only I eat fish.	Only I eat fish. Nobody else does.

A) *According to police records, many dogs are killed by automobiles and trucks.*

This sentence suggests that it is the automobiles and trucks that roam unleashed. The correct sentence should read: *According to police records, many dogs roaming unleashed are killed by automobiles and trucks.*

Limiting modifiers like *only*, *almost*, *even*, *hardly*, *rarely*, etc., must be carefully placed, in order to convey the correct message. Changing the position of a limiting modifier completely changes the meaning of the sentence. Let us look at an example.

A modifier has to modify only one element in a sentence. A modifier that seems confusingly to refer to either of two words is known as a squinting modifier.

E.g.: *We decided immediately to buy the car.*

Here, it is difficult for the reader to decide whether 'immediately' modifies 'decided' or the phrase 'to buy the car.' That is why it squints. The correct version would be either of these two sentences, depending on what the writer intended to convey:

i) *We immediately decided to buy the car.* ii) *We decided to buy the car immediately.*

Modifiers that do not sensibly modify anything in the sentence are called dangling modifiers.

Look at this sentence:

*Passing the building, the vandalism was clearly visible.*

Here the modifying phrase, *passing the building*, seems to modify vandalism. But vandalism does not pass buildings. So, who was passing the building? Who saw the vandalism? Obviously, the modifier has an implied or unnamed subject, which the reader assumes is the same as in the main clause that follows. When the two subjects are not the same, the modifier "dangles," unconnected to the rest of the sentence and the sentence makes little sense. Revised, the sentence would read: *As we passed the building, the vandalism was clearly visible.*

### Block-3: Formatting Letters And Writing Business Reports

5. A similar grammatical form or parallel construction should be used while expressing related ideas.

Let us look at an example:

The personnel manager is concerned with selecting the right worker, appropriate orientation and the worker's progress.

Here, the three clauses that express the three related ideas have different constructions. The correct sentence would be:

*The personnel manager is concerned with selecting the right worker, providing appropriate orientation, and determining the worker's progress.*

6. Always use the active voice, unless you feel that the passive voice is more appropriate.

Look at these two sentences:

1) *Sheila wrote the book.* 2) *The book was written by Sheila.*

The first sentence, which uses the active voice, draws attention to Sheila. The second one, the passive sentence, draws attention to the book. Because, they focus attention on the doer, active sentences are more vivid and, therefore, preferred in business writing. However, the passive voice is used in the following situations:

- a) To emphasize the object of action more than the doer: *Dinner is being served.*
- b) To avoid an accusing tone: *Three errors have been made on this page.* This sounds much better than saying "You made three errors on this page."
- c) To avoid revealing names: *The new scheme has been criticized.*

---

### **Check Your Progress - 1**

1. A part of the following sentence is underlined. It is followed by four alternative versions of the underlined portion. Select the alternative you consider the most correct and most effective according to the requirements of standard written English.

Parliament is debating a bill requiring certain employers *provide workers with unpaid leave so as to* care for sick or newborn children.

- a. Provide workers with unpaid leave so as to
- b. To provide workers with unpaid leave so as to
- c. Provide workers with unpaid leave in order that they
- d. To provide workers with unpaid leave so that they can
- e. To provide workers unpaid leave so much so

2. *There were three reasons for our staying away from the festivities.* Identify the expletive in this sentence.
  - a. Three
  - b. There
  - c. For
  - d. Reasons
  - e. Festivities
3. Which of these sentences has a squinting modifier?
  - a. We decided immediately to leave
  - b. We immediately decided to leave
  - c. We decided to leave immediately
  - d. Immediately we decided to leave
  - e. We leave immediately
4. A \_\_\_\_\_ is a direct statement of an idea that almost anyone would know already.
  - a. Précis
  - b. Platitude
  - c. Paragraph
  - d. Preface
  - e. Prefix

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## 20.4 Punctuation

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Punctuation marks are used to help readers extract meaning from a sentence, in much the same way that a speaker uses pauses and voice inflection. Clarity is a primary consideration. Convention is another important issue. Let us look at the different ways in which the most common punctuation marks are used.

1. **Apostrophe** – An apostrophe is used to represent possessiveness. We use the apostrophe:
  - a) To form the possessive singular: add an apostrophe and an s. Eg: *bird bird's*
  - b) To form the possessive plural: add an apostrophe after the s. Eg: *writers writers'*
  - c) To form the possessive of a proper noun in which the last letter is not an s: add an apostrophe and an s. Eg: *i) Ashok's companion ii) Hema's school*
  - d) To form the possessive singular when the last letter in a proper noun is an s. Here, the place of the apostrophe is determined by the number of

### Block-3: Formatting Letters And Writing Business Reports

syllables in the noun. If the singular form of a one-syllable noun ends in s, then the possessive is formed by adding an apostrophe and an s.

Eg: i) *Das Das's*                      ii) *Vyas Vyas's*

When the singular form of a proper noun has more than one syllable and ends in an s or an s sound, then the possessive is formed by adding only an apostrophe:

Eg: i) *Haridas Haridas'* ii) *Gonzalez Gonzalez'*

- e) In expressions that indicate ownership. The apostrophe indicates that a preposition has been left out. Eg: *last year's schemes (schemes of last year)*
- f) When the noun presents time or distance in a possessive manner. Eg: *an hour's wait*
- g) When a noun precedes a gerund. Eg: *Mr. Prasad's receiving the promotion caused...*

We do not use the apostrophe to form the possessive of a pronoun. Eg:

i) *yours* – not *your's* ii) *ours* – not *our's*

## 2. Comma

- a) We use a comma between coordinate clauses joined by and, but, for, and other coordinate conjunctions.

*She wanted to play and dance in the rain, but was afraid her mother would scold her.*

- b) Commas are used after participial phrases or dependent clauses:

*Believing that the people were ignorant, the gangster continued to cheat more people.*

Commas are used in sentences that begin with prepositions such as *if*, *as*, and *when*.

*If you can complete reading the book, please plan to be here to take another book.*

- c) Comma is also used to separate words in a series:

*She likes to eat fruits, chicken, rice, and cooked dal.*

Commas are inserted between two separate adjectives that modify the same noun:

*We want beautiful, well-educated, modest and working brides.*

- e) Comma is also used to separate a clause that is not essential to the basic meaning of the sentence, from the rest of the sentence:

*Mrs. Hillary Clinton, who is a friend of Indian businessmen, is arriving tomorrow from USA.*

- f) Commas are also used to separate parenthetical expressions from the rest of the sentence:

*Swarna, hiding her sense of anger, greeted her mother-in-law cordially.*

- g) Commas are used before and after the year in the month-day-year format:

*On August 17, 2016, Mrs. Patil won the chess championship medal.*

- h) Comma is inserted after addressing a person:

*Gopinath, I want you to complete the work assigned to you.*

- i) Commas are also used after the words No and Yes when they introduce a statement:

*i) Yes, you can play with me ii) No, I can't come for dinner tonight.*

- j) Commas are used before a question that seeks a confirmatory answer:  
*It's a lovely picture, isn't it?*

- k) Comma is used after an adverbial conjunction:

*The lesson was easy to learn; however, it was not covered in the syllabus.*

### 3. Colon – We use a colon

- a) To suggest that a list will follow a statement that appears in complete-sentence form:

*We have decided to move to a new location for three reasons: (1) We need a bigger market. (2) We need an inexpensive source of raw materials. (3) We need a ready source of labor.*

- b) When the verb that completes the sentence is sufficiently understood and therefore omitted. Eg: *The team lost the game. The reasons: (1) no team spirit, (2) no practice, and (3) no determination.*

- c) To stress a noun that renames the preceding noun at the end of a sentence:

*Her heart was set on one thing: the blue dress with white roses.*

- d) Between hours and minutes to express time in figures:

*i) 5:45 p.m. ii) 11:20 a.m.*

### 4. Semicolon – We use a semicolon

- a) When a conjunction is omitted:

*This year the company hasn't declared a bonus and the workers are very unhappy about it.*

*This year the company hasn't declared a bonus; the workers are very unhappy about it.*

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#### Activity 20.2

This year the rainfall was scanty and the farmers suffered losses because of it. Rephrase the above sentence using a semicolon.

**Answer:**

- b) In a compound-complex sentence: *As indicated earlier, we'd appreciate it if you reached here on Friday; but Saturday morning would also be acceptable.*
- c) Before an adverbial conjunction: *There is little fear of a second attack; nevertheless, it would be wise to be on one's guard.*
- d) In a series that contains commas: *Most of the batsmen scored well in the match: Sachin, 102; Ganguly, 86; Raman, 74; and Kambli, 68.*
- e) Before illustrative words, as in the following sentence: *We have plans for expansion; for example, we intend to set up a new plant at Vadodara.*

#### 5. Dash – We use a dash

- a) To set off parenthetical elements that represent a break in the flow of thought:  
*The rapid spread of the disease – at least a hundred new cases were reported each day – had the doctors alarmed.*
- b) To set off parenthetical elements that require internal commas:  
*The qualities Monet painted – sunlight, rich shadows, deep colors – abounded near the rivers and gardens he used as subjects.*
- c) Before a summarizing appositive:  
*Computer chips, integrated circuits, bits and bytes – these new terms baffled yet intrigued.*

Punctuation marks play a vital role in writing an essay. A wrong punctuation mark can alter the meaning of a sentence and might not communicate the meaning the writer intends. For example, a class of boys and girls was given this sentence to punctuate:

*Woman without her man is nothing.*

Most of the boys kept the sentence as it was without adding any punctuation marks. But the girls came up differently as given below:

*Woman! Without her, man is nothing.*

---

### **Check Your Progress - 2**

5. Pick the correct sentence \_\_\_\_\_.
  - a. When I reached his house, the door was locked
  - b. When I reached his house the door was locked
  - c. When, I reached his house, the door, was locked
  - d. When I reached his house; the door was locked
  - e. When, I reached, his house, the door was locked.
6. In which of these cases is a comma not used?
  - a. Between coordinate clauses joined by *but, for*
  - b. Between hours and minutes to express them in figures
  - c. After dependent clauses
  - d. Between words in a series
  - e. Between phrases
7. Pick the correct sentence \_\_\_\_\_.
  - a. Mr. Mittal, who is an engineer will move into the house
  - b. Mr. Mittal, who, is an engineer, will move into the house
  - c. Mr. Mittal, who is an engineer, will move into the house
  - d. Mr. Mittal who, is an engineer will, move into the house
  - e. Mr. Mittal, who is an engineer will, move into the house.

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## **20.5 Paragraphs**

Now that we've taken a quick look at the way sentences are structured, let's try to figure out how sentences are grouped together to form paragraphs. Look at this group of sentences:

*Amrita went out for a walk in the countryside. She had a maid who was always irregular to work. Her daughter was hungry and needed some food. Amrita was very fond of her aunt.*

These sentences cannot be said to make a paragraph for two obvious reasons:

1. First, the paragraph has no unity. It does not adhere to any one idea.

### **Block-3: Formatting Letters And Writing Business Reports**

2. Second, it has no coherence. The sentences in the paragraph do not relate to each other.

A proper paragraph must be coherent. Each paragraph must have one central idea and based on that central idea, all sentences are to be framed.

This sentence, called the topic sentence, may appear at the beginning, in the middle, or at the end of a paragraph. The topic sentence not only introduces the main idea, it limits the topic of the paragraph, and often suggests how the paragraph will be developed. The other sentences in the paragraph support, illustrate, or lead to the main idea.

#### **Logical Order**

Paragraphs must be developed in a logical order. For example, the chronological or time order, must be maintained while developing sentences in paragraphs. In order to maintain logical order and provide coherence, ‘connectors’ or ‘transition words’ like ‘because’, ‘at last’ etc. should be used.

#### **Concluding Sentence**

The concluding sentence of the paragraph usually restates the main idea in a different way. While the other sentences substantiate the main argument, the concluding statement is a summing up of sorts.

Exhibit 20.1 provides views on review of writing skills by peers.

#### **Exhibit 20.1: Benefits of Review by Peers**

##### **Is it a good idea to go for peer review training in the case of graduate students?**

Manuscripts sent for publications are carefully scrutinized by the editors and other experts in the field before being accepted. Peer review process provides scope for constructive feedback that can help us organize our ideas better and improve the quality of our paper, making it publication-ready.

##### **Benefits of Peer Review to Students**

Students reading each other’s work and giving feedback to one another could have similar benefits – it helps them improve their critical-thinking and communication skills.

Peer review training helps students to prepare manuscript for a broader audience; by strengthen their own writing skills by taking into account critique from potential readers.

Peer review helps graduate students become active learners during the writing process, for which, they need clear guidance. Initially they may be hesitant to participate in the training because of receiving criticism from their fellow students.

*Contd. ....*



One must orient the students towards the skills required for peer review. These include: critical reading, identifying main points in academic articles, and responding to comments and questions in a comprehensible manner; and communicating effectively with fellow students.

### **Reading Can Improve a Paper**

Organizing sessions for students to work together to turn a poor text into a good one, or by introducing self-evaluation exercises, can help them to improve their evaluating skills. They can request other students to evaluate their write ups.

### **A peer reviewer is not an evaluator.**

The role of the peer reviewer should be defined as that of a reader rather than an evaluator by developing guidelines for peer review. Students should first list the strengths of a work and then describe the parts that can be improved without being judgmental about the paper and the author. Such type of activity can help students improve their writing skills and develop better communication stratagems.

*Excerpts from: <https://www.enago.com/academy/can-peer-review-training-help-graduate-students-improve-their-writing-skills/> 10 Sept 2020*

### **Check Your Progress - 3**

8. The \_\_\_\_\_, like the topic sentence of a paragraph, expresses the author's main idea, around which the entire essay is built up.
  - a. Opening sentence
  - b. Rhetorical statement
  - c. Thesis statement
  - d. Storyline
  - e. Concluding sentence

## **20.6 Compositions**

The structure of an essay and that of a paragraph, are more or less the same. The only difference between them is that an essay consists of few paragraphs. An essay usually has three parts – the introduction, the body, and the conclusion. The introduction and the conclusion are usually a paragraph each, but the body may be made up of several paragraphs. Each paragraph in the body will have a topic idea that expands on the essay's thesis (or main idea), using appropriate supporting material.

### **Block-3: Formatting Letters And Writing Business Reports**

#### **Steps in Essay Writing**

To help the reader understand the thoughts of the writer, the essay must have a clear organizational plan. This can be achieved by adopting a systematic approach as discussed below.

#### **Limiting a Topic**

Once the topic has been selected and adequate information about it is gathered, the writer must limit the topic so that he/she can develop it properly. A vast topic limits the development of description, examples, or illustrations. A topic of manageable size, on the other hand, can be examined in depth and detail.

#### **Clarifying the Purpose**

After limiting the topic, the writer should work on how to deal with the topic. Answering the questions – why is he/she writing; for whom is he/she writing; what does he/she want to convey to the readers – will help the writer in formulating the thesis statement.

#### **Writing the Thesis Statement**

The thesis statement, like the topic sentence of a paragraph, expresses the author's main idea, around which the entire essay is built up. He/she must have the thesis statement clearly in mind, before it is actually put down on paper. Sometimes the thesis statement is not openly stated – only implied.

#### **Writing the Introduction**

The introduction to an essay often determines whether the reader will continue to read the essay or dump it. The way the ideas are introduced depends on the audience and the type of essay. Broadly, an introduction should 1) Capture the reader's attention, 2) Present the thesis statement (main idea), 3) Give the reader an idea of the material that will follow, 4) Hint at how the writing has been organized.

#### **Planning and Writing the Body**

To write the body of the essay, the writer must organize his/her ideas. He/she can put down all the ideas about the topic that come to his/her mind. Even those that might seem irrelevant to the thesis can be included. After penning down all the ideas, the writer can sift through them and select the ones that seem to have a bearing on the thesis statement. He/she can see how many of them can be developed adequately as supporting ideas for the main idea. If the writer finds that the ideas are related, they can be grouped together. Each of these groups can then be developed into a paragraph in the body of the essay.

The writer has to, however, ensure that each paragraph leads smoothly to the next one. In other words, the transition from one idea to the other must not be abrupt.

### **Writing the Conclusion**

Once all the supporting ideas have been developed to illustrate the thesis statement, the writer has to write the conclusion. A conclusion must direct the reader's attention to the key points of the essay. The nature and type of the essay determines the conclusion. The essay can conclude in a result, restatement, prediction, recommendation, or a quotation.

After writing the essay, it's always worthwhile to revise it.

All communication, whether written or oral, must be clear, precise, and thoughtfully structured, if it is to be effective. However, structure and precision play a more important role in written language. The importance of precision and conciseness can never be over-emphasized.

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### **Check Your Progress - 4**

9. Which of the following should the introduction to the essay not do?
    - a. Capture the reader's attention
    - b. Present the concluding statement
    - c. Present the thesis statement
    - d. Give the reader an idea of what will follow
    - e. Hint at how the writing is organized
  10. In an essay, the \_\_\_\_\_ from one idea to the next must not be abrupt.
    - a. Transportation
    - b. Transition
    - c. Transubstantiation
    - d. Transcription
    - e. Transfer
-

### Block-3: Formatting Letters And Writing Business Reports

Exhibit 20.2 provides important aspects of writing a book review.

#### Exhibit 20.2: Improving Book Review-Writing Skills

Some tips on writing book-reviews are:

1. **Know the concords of what to talk about.** A book review summarizes a plot or an event. Never give away the ending at the beginning of the book. It should be a suspense for the reader to discover as the plot unfolds
2. **Study about the writer and the genus for perspective.** It is essential to identify the writer and his background to do justice to the book review.
3. **Keep it positive.** For most books it's important to take a constructive tone and talk about how the author might have approached the story more effectively.
4. **Write for your addressees, not for publishers.** Avoid book industry jargon in your reviews. Book reviews should be written conversationally for an average, educated reader.
5. **Explain why your readers should care.** Let your reader know why the book you are reviewing is worth selecting above a million other titles, or why it isn't. Remember – a reviewer's opinion matters a lot for a book to be saleable.
6. **Seek professional help.** It can be helpful to seek specialized direction to craft the best reviews possible.

*Excerpts from: <http://www.popculturebeast.com/6-ways-to-improve-your-book-review-writing-skills/> July 2018*

### 20.7 Summary

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- Sentences follow a certain grammatical structure to make sense and convey meaning.
- Using punctuation marks at the appropriate places is essential for a sentence to be meaningful.
- Writing an essay involves limiting the topic, clarifying the purpose, writing the thesis statement, writing the introduction, planning and writing the body, and writing the conclusion.
- Essays are structured as – the introduction, the body, and the conclusion.

### 20.8 Glossary

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**Dash:** A dash is used to set off parenthetical elements that represent a break in the flow of thought, to set off parenthetical elements that require internal commas, and before a summarizing appositive.

**Paragraph:** A proper paragraph must have unity and coherence. It must be based on one central underlying idea that draws together all the sentences in the paragraph.

**Punctuation:** Writers use punctuation marks to help readers extract meaning from a sentence, in much the same way that a speaker uses pauses and voice inflection. Clarity is a primary consideration. Convention is another.

### 20.9 Self-Assessment Test

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1. Write about different types of punctuation marks that can be used for better written communication, using examples.
2. What are the basic guidelines that must be followed in writing a meaningful paragraph?
3. Write about the elements that constitute the structure of an essay.

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### Block-3: Formatting Letters And Writing Business Reports

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### 20.11 Answers to Check Your Progress Questions

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**1. (d) To provide workers with unpaid leave so that they can**

Option (d) is correct. Employers have ‘to’ provide something so that workers ‘can’ do something. Options (a) and (c) do not precede the verb with a ‘to,’ and are therefore, incorrect. Option (b) does not have the pronoun ‘they.’ In the absence of the pronoun, the meaning becomes ambiguous. Who will look after the children, the employers or the workers?

**2. (b) There**

The word ‘there’ is called an expletive – a filler word that has no real meaning in the sentence.

**3. (a) We decided immediately to leave**

A modifier should modify only one element in a sentence. A modifier that seems confusingly to refer to either of two words is known as a squinting modifier.

**4. (b) Platitude**

A platitude is a direct statement of an idea that almost anyone would know already:

- 1) *Team members should cooperate with one another.*
- 2) *Employees like to be well paid.*

Since the message is so elementary, a reader often feels insulted by these sentences and this hampers his receptivity to the rest of the message.

**5. (a) When I reached his house, the door was locked**

In sentence 'a' the comma is correctly placed after the introductory phrase.

**6. (b) Between hours and minutes to express them in figures**

A colon is used between hours and minutes to express time in figures.

**7. (c) Mr. Mittal, who is an engineer, will move into the house**

Sentence 'c' correctly subordinates the appositive.

**8. (c) Thesis statement**

The thesis statement, like the topic sentence of a paragraph, expresses the author's main idea, around which the entire essay is built up. You must have your thesis statement clearly in your mind, before you actually put it on paper. Of course, when you actually write the essay, the thesis statement need not be expressed in a single sentence. You can slip it in two or more sentences. Sometimes the thesis statement is not openly stated – only implied. Be that as it may, you must be absolutely clear about your thesis statement, so that you know exactly where your essay should go, before you begin, and you stay on course once you've set sail.

**9. (b) Present the concluding statement**

An introduction to an essay should not present the concluding statement. Broadly, an introduction should

- Capture the reader's attention.
- Present the thesis statement (main idea).
- Give the reader an idea of what material will follow.
- Hint at how the writing is organized.

**10. (b) Transition**

When composing an essay, the writer must ensure that one paragraph leads smoothly into the next one. In other word, the transition from one idea to the other must not be abrupt.

## Business Communication & Soft Skills Course Structure

<b>Block 1: Non-Verbal, Oral, and Group Communications</b>	
Unit 1	Fundamentals of Communication
Unit 2	Nonverbal Communication
Unit 3	Listening
Unit 4	Negotiations
Unit 5	Interviewing
Unit 6	Group Communication
Unit 7	Making Presentations – Getting Started
Unit 8	Organizing and Presenting the Speech
<b>Block 2: Writing Business Letters, Resumes and Memos</b>	
Unit 9	Letter Writing: Writing about the Routine and the Pleasant
Unit 10	Writing about the Unpleasant
Unit 11	Writing to Persuade
Unit 12	Communication for Employment – Resume
Unit 13	Communication for Employment – Application Letter
Unit 14	Writing Effective Memos
<b>Block 3: Formatting Letters and Writing Business Reports</b>	
Unit 15	Structure and Layout of Letters
Unit 16	The Framework of a Report
Unit 17	Writing Business Proposals and Business Plans
Unit 18	Writing the Report
Unit 19	Managing Data and Using Graphics in Reports
Unit 20	Review of Writing Skills
<b>Block 4: Managing the Self</b>	
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Unit 22	Business Etiquette
Unit 23	Managerial Effectiveness – A Conceptual Framework
Unit 24	Stress Management
Unit 25	Creativity in Management
<b>Block 5: Managing People</b>	
Unit 26	Emotional Intelligence in Management
Unit 27	Interpersonal Skills
Unit 28	Leadership and Change Management Skills
Unit 29	Multi-Cultural Communication Skills





