Business and Technical Writing

Introduction

As writers work through the U. S. educational system, they focus on learning and mastering academic writing. Most academic writing follows a basic structure. The academic text typically begins with a thesis or hypothesis. The thesis or hypothesis is followed by paragraphs that provide supporting evidence. The academic text then typically ends with a conclusion that offers a summation of the evidence that supports the thesis or hypothesis, and many times the author will also use the conclusion to guide readers to areas in need of further research.

Structure of Academic Writing

- Thesis or hypothesis initiates the text
- Cited evidence serves as the body of the text
- Conclusion of summation and ideas for further research closes the text

Translations like the one above—turning prose into a bulleted list—can also be a part of academic writing, especially if the writer is trying to outline a series of topics or points that will be covered in the detailed, evidenced, and cited paragraphs that follow. Business and technical writing, on the other hand, are driven by lists, and those lists are enhanced by prose as needed.

In business writing, prose and lists come together to give the reader the main points on a particular topic. In technical writing, prose and lists come together a) to provide easily accessible information and/or b) to give the reader a series of steps to follow to complete a desired task. Brevity, conciseness, and accuracy are critical components of both genres. Another very visible difference between academic writing and business and technical writing is evidenced in the logic behind whether or not to attribute the information presented in the writing.

Academic writing is composed to archive the knowledge in a field. So ensuring that the reader of today and of next generations can locate all of the cited sources becomes crucial for keeping the peer review process going. If the academic reader can't locate the sources cited in an academic text, then that text must be discarded from the knowledge pool, as peers can no longer review the validity of the cited sources. Thus, academic writing is a permanent archive of a field that is required to stand the test of time.

While many business and technical documents do survive for future generations, these genres are not driven by the same need for permanence that guides academic writing. Thus, the need for strict citation is not a driving factor in these genres. In business and technical writing, where the information came from—who owns the intellectual property of the idea—is not as important as conveying how to act on the information.

While academic writing and business and technical writing share the common tenet of all writing—convey the message in a way the reader can understand—academic writing is part of an ongoing conversation about a body of knowledge. Business and technical writing are part of a conversation that may or may not be ongoing. For example, in a business, a committee in a company may read many updates on a project, so the conversation is ongoing for a given period of time. But the conversation has a limited time frame and a defined and finite goal, and the voices in this conversation are not charged with attributing ideas to the owner; instead, the voices are working together to meet the goal that the document addresses.

On the other hand, a technical writer might be charged with creating a user guide for a DVD player. The audience will read the user guide as needed, so the conversation is ongoing in the sense that the document will be read by many different people at different times and places. The document offers instructions that are finite and will not change. Additionally, the document is not working to evidence a claim, as with academic writing. The document is not working to complete a project, as with business writing. Instead, the document in technical writing works to create a finite set of instructions that can be read and understood by a wide audience at any given time and place.

Academic Writing	Business and Technical Writing
Prose is primary writing mode	Lists, bullets, and short paragraphs are primary writing mode
Thesis is in opening paragraphs	Thesis is in paragraph, phrase, or heading
Ideas are divided by paragraph	Ideas are divided by paragraphs, lists, or sections
Sources are a permanent record	Sources are only as permanent as the message
Paragraphs are preferred over lists	Lists are preferred over paragraphs
Sentence diversity is valued	Parallelism and repeated patterns are valued

With these basic similarities and differences among these three genres outlined, the reality is that all three genres may be a part of life for today's writer attaining higher education—for the scholar-practitioner. Academics are enriching the knowledge pool with their scholarly writing, but academics are also writing in the genres of business writing and technical writing as practitioners in the commercial world in which they work and live. Becoming fluent in all three genres gives the writer a voice in all three genres. We will focus here on offering basic definitions for business and technical writing and offering samples of some of the basic writing tasks within these genres. Thus, while coursework may or may not require the use of business or technical writing, the outside world often necessitates the use of these genres.

What is Business Writing?

Business writing is an important part of American culture. The prevalence of email culture has even brought some of the basic tenets of business writing into our every day lives. Imagine that you are writing to an office colleague about the supplies you need for your work space. How do you compose that message? Sometimes the composition is driven by list making; other times you are preparing an agenda or asking for guidance on how to approach a project. You may write a brief introduction that explains the list to follow, and then compose your list.

In short, business writing is a genre of writing designed to present the most salient points of a given topic in the most concise and easy-to-decode method possible.

The core elements of business writing are

- conciseness to avoid misguiding the reader with unnecessary details

- parallelism to avoid breaking the reader's expectations or predictions

Like every other kind of writing, business writing is also a context; it is a writing situation. Compared to other genres, business writing (in general) can be more formal—although there are exceptions. When you write for a business purpose you are writing for a specific audience and a specific reason. And like any other type of writing, you will probably find your writing will go through stages as you compose it.

This document aims to provide descriptions and samples of business and technical writing, and to show a glimpse into the process of these samples as they emerge from the primal ooze of semi-organized pre-writing notes to a polished draft.

What is Technical Writing?

Technical writing is a category of technical communications—which is a broader field that involves documenting, sharing, interpreting, and/or publishing specialized medical, scientific, biological, technological, organizational and/or other information. Technical writers are typically responsible for assembling documents such as handbooks, field guides, textbooks, user manuals, catalogs, web pages, software or equipment instructions, and policies and procedures manuals.

As with business writing, technical writing is bound by many of the same basic concepts as other writing genres. For example, your technical writing has an audience and you (as the writer) have a reason for communicating with that audience. Sometimes you are sharing information on cancer research with oncologists who share predictably similar levels of expertise, and so you will address them differently. Other times you may find yourself interpreting information for a mainstream non-specialist audience whose level of expertise is less predictable and more variable.

Whatever the purpose may be for your technical writing, this document aims to provide descriptions and samples of technical writing and show the various stages of the "life cycle" of selected samples of technical writing.

A Visual Look at Business and Technical Writing

This basic example exemplifies some of the basic tenets of business writing and serves one purpose: to convey specific information.

Mary:

Per your request, I am providing a list of supplies that need to be reordered for my workspace:

- Paper clips
- Pencils
- Tape

Thank you,

Tom

First, notice that a colon follows the recipient's name instead of the more familiar comma that appears in a letter or email to a friend. The punctuation choice of the colon is more formal, more appropriate for a business environment.

Second, notice that the opening sentence repeats the request from Mary:
Per your request, I am providing a list of supplies that need to be reordered for my workspace.

Notice that this introductory clause is followed by a comma that leads to the main part of the sentence:
I am providing the following list:

These two thoughts could have been written as individual sentences, but in the interest of being concise and direct, the writer chose to conflate the two, with the information after the comma containing the main message of the email—the list Mary asked for.

Third, notice that the sentence, though complete, does not end in a period. Instead, the writer chose to use a colon, the common business writing punctuation choice used to indicate that a list is to follow.

Fourth: notice the way that the list is constructed. All of the items are nouns. Thus, they are constructed in parallel form. By choosing to list each entry as a noun, the reader can easily decode the items on the list by scanning them through a reading technique known as predictability. When the reader sees the first item, paper clips, the reader anticipates that the next item will be a similar part of speech. If that expectation is not met, the reader will have to pause and may even stumble while working to figure out how and why the expected pattern was broken.
Notice the difference between a parallel list and a list that is not parallel:

PARALLEL	*NOT PARALLEL*
• Paper Clips • Pencils • Tape	• Paper Clips • The Pencils that have red lead • Some sort of tape

Of course, conciseness and parallelism are helpful in all forms of writing, including academic writing, but in business writing, the goal is to keep the sentences concise, replacing paragraphs with lists when possible. In academic writing, the goal is to translate notes and lists into paragraphs that are tied together with a main idea, supporting evidence, and a transition into the next paragraph. In business writing, transitions are used to promote brevity and to add focus to the main idea that often introduces supporting evidence in list form, as in the business email provided above. Transitions in business writing are often single words in the text:

First, we will approach the demographic.
Second, we will define the demographic.

The use of numbers in this example gives the reader clues for predictability. Using numbers lets the reader know that a series of steps are coming. Other times, transition words can be used to let the reader know that an opposing point is being presented or that more pertinent information on a topic is being presented. Both of these transition word tactics give the reader a clue to predict what is coming.

We will define the demographic in four categories.
However, we will not define the demographics by gender.
Additionally, we will not examine ethic background in our definition.

Business writing also embraces the use of headings to give the reader clues to predict what the content in that section will address, and those headings can serve as transitions and/or connections between ideas.

Approaching the Demographic

In this section, we will approach the basic elements of the demographic that are important to the project. These elements include

- age of the participants
- education level of the participants
- computer literacy of the participants
- technology needs of the participants

Defining the Demographic

In this section, we will approach the details of the basic elements of the demographic that are important to the project. Those details for each category include

- age categories divided by multiples of ten (ex: 10-20, 21-30, 31-40, etc.)
- education levels divide by degree (ex: Bachelor's Degree, Master's Degree, etc.)
- computer literacy with Microsoft Word products
- technology needs to improve usage of Microsoft Word Products

Notice the clues provided by the headings. Notice also the salient information in each category is presented in list form. Notice also that all elements of the headings and sections are parallel and concise. The first heading begins with the gerund form: 'approaching.' The same pattern is repeated in the next heading: 'defining.' The introductions to both sections are also in parallel construction: 'In this section, we will…' And the lists are in parallel form: 'age, education level, computer literacy, and technology needs.' Thus, much information is presented briefly, and this information is clear and easy to decode for the reader because the transitions are included, and the format of each element of the writing is constructed in parallel form.

Conciseness and parallelism are also helpful in technical writing, but for different reasons. Notice the similarities and differences between the business email example and the technical writing email below:

Mary:

Below are the directions to the boardroom that you requested:

1. Turn right out of your office door
2. Turn left at the water cooler
3. Walk to the end of the hall
4. Turn left at the hallway immediately in front of the stairwell
5. Turn right at the third door on the right

See you there,
Tom

Like the business writing email, this technical communication is also written for one purpose: to convey information. But in this case, the order of the information is critical for the reader's understanding. Therefore, in technical writing, if the order of the information matters, numbers are used in the list. If the order does not effect the execution of the information in the list, then bullets are used. In the business writing example, it doesn't really matter which comes first: tape or pencils. But in the directions provided above, confusing the order or leaving out a step in the process will not allow the reader to perform the task that the email requests: arriving at the correct location of the board meeting.

Thus, the primary difference between business writing and technical writing involves the purpose of the genres. Business writing works to present all of the relevant points on the subject in a concise manner. Technical writing also serves to present all of the relevant points on the subject, but with technical writing, easy access to information and the order of the events, the steps in the process are the main reasons for the communication. Thus, access, order, and presentation of a particular process, are the driving forces behind technical writing.

Examples of Business and Technical Writing

Now that the basic parameters of business and technical writing have been outlined, examples of common forms of business and technical writing are presented.

Example 1 – Business Letter - Description

The formality of the business letter distinguishes it from casual emails, typical office memos or instant text messaging that we may encounter during a work day. Examples of business letters include cover letters, letters of recommendation, formal complaints, query letters, legal letters (e.g., a cease and desist letter), letters of credit, or the letters that are often required as part of a project or grant proposal—to name just a few. While there are exceptions, these forms of business letters share a common thread—they are earnest in tone, usually written in block format, and have a clear purpose that is succinctly described throughout the letter.

Other specifications common to the business letter format: Date at top, addressee's address, salutation, left justified margin, and signature. Also, if the letter is being sent to others it should be indicated by CC meaning "carbon copy."

Example:

January 1, 2008

Ms. Amanda Speakerton
811 Mouth Open Road
Bureau, WI 50023

Greetings Amanda,

I enjoyed our meeting last week, and appreciate the time you gave to inform us about the wide spectrum of speakers available through the Motivational Speakers Bureau. After reviewing the bios of the candidates you recommended and following up with their references, our events committee decided that Jim Groeschen is the speaker who best matches our current training needs.

As you and I discussed at our meeting, our committee has been asked (based on the results of an employee survey) to find ways to inject more humor into our time management training. Based on our meeting and your recommendations based on our corporate profile, we feel strongly that Jim Groeschen's seminar *Pancakes for Dinner: How Scatterbrains Can Regain Control of Their Reality Using Simple Calendar Rearrangement Tactics* will be an effective and entertaining way to break through some of our staff's views of time management training.

Although you more strongly recommended the two other speakers, the members of the Events Committee and I felt their stricter emphasis on memorizing the principles and techniques of proper time management would not be as well received as Jim Groeschen's more easygoing presentation.

We definitely want to setup a speaking engagement with Jim as soon as possible. Per your request, I am enclosing a deposit of $1,500.00 and a completed speaker request form. Ideally, the NuTech Events Committee would like Jim to speak the week of September 15 while the training sessions are underway; however, if he is not available that week, the previous week would work as well.

On behalf of the NuTech Events Committee, we thank you for your enthusiasm and interest with helping us develop a great week of training.

Gratefully Yours,

Sheila Jameson
Senior Events Planner

Example 2 – Memo - Description

Like the letter, the memo (short for *memorandum*) is a genre with a wide spectrum of subgenres. A memo can be a message that informs your contacts about an important meeting or a critical problem, or a memo can be a friendly reminder to keep the coffee area clean.

The purpose of the following example is to inform (and remind) company employees about the process of saving data that might be lost during a standard system reboot.

Example:

Attention Fellow MegaCorp Employees,

The new inter-departmental e-mail will undergo a standard reboot from 4:30pm to 5:30pm on Friday. This reboot helps flush the system of static memory, resulting in increased speed. During the reboot, our email system will be offline and unavailable for sending or accessing messages. Do not call the Help Desk if you are kicked off the system. You will regain access to your email at 5:30 p.m.

Note: since our e-mail system is new, we may experience errors we can't correct yet. This said, we ask that you save all emails received since yesterday and Work in Progress to your hard drive because we may not be able to retrieve data from Thursday through today (Friday) if the reboot fails.

To save works in progress:

1. Open your Drafts folder and right-click on each file.
2. From the drop-down list, select the "Save to Disk" option.
3. Choose your desired location to store your files.
4. Click on “Save.”

To save recent emails, follow this procedure:

1. Right click on the e-mail's subject line.
2. Select "Save to Disk."
3. Choose your target location.
4. Click on “Save.”

Remember, the reboot only affects works in progress on your email system. You do not have to save any other work stored elsewhere on your computers!

We apologize in advance for any convenience.

Lily Webb
Director, Information Services

Example 3 – Sales Report - Description

The purpose of the sales report largely depends on the purpose for which it's being created. For example, if sales are materializing at a predictable pace, a quarterly sales report might produce a rather perfunctory document. However, if sales data can be linked to emerging trends, or if a report is intended to analyze sales data across months or years, the purpose of the sales report might serve as a document of future forecast. If trends that impact sales unfold rapidly, the sales report might play the role of a strategic document that aims to provide intelligence for people who need to make sound business decisions.

Example:

Plastic Orbit Enterprises
Mid-Year Sales Report – Bumpzinger 5000
June 2007

Purpose

To report on the current unexpected low sales of the Bumpzinger 5000 and provide urgent recommendations for immediate action steps to rectify the situation.

Overview of Product Sales

As of June 2007, less than 10% of our Bumpzinger 5000 inventory was sold, and mid-year projections promise no improvements. As sales director and primary executor of the rollout of this product, I see no way to recoup losses with our current price strategy. My team and I have met extensively since late April to discuss these trends; we recommend a 50% price cut effective immediately.

Analysis of Sales

Marketing confirms the Bumpzinger 5000 was undersold by BumpHappy, Inc.'s cheap generic version of the Bumpzinger 5000—the Flipwhopper—which sells for $29.99 compared to the Bumpzinger's $79.99. Several of our main distributors confirm our suspicions—customers are less cognizant about quality differences between the two products; price seems to be the biggest factor guiding their product selection.

In addition, a small but significant portion of our market has been siphoned by BumpetyBump Corp's new reverse polarity Fizzleflopper—which we knew was coming, but it was released six months ahead of schedule. Their sudden burst on the market has sent waves through the pre-teen bump scene; they've acquired a larger than expected share of the market by developing a sizeable cult following for the short amount of time they've been on the market.

Between the Flipwhopper and the Fizzleflopper, the Bumpzinger 5000 has been squeezed on both sides of the price spectrum, and any chances of the Bumpzinger repeating last year's performance when we enjoyed uncontested market dominance has been eliminated.

Action Steps

Our sales recovery strategy is twofold: first we need to reduce prices. Based on numerous conversations with distributors and clients, my advisory team recommends a 50% price cut. By reducing the price, we would place the Bumpzinger 5000 at $39.99—just a notch above the $29.99 Flipwhopper and a comfortable distance from the $119.99 Fizzleflopper.

Secondly, we need to employ alternative marketing strategies. BumpetyBump has a traveling bus they use to drive along the West Coast and drum up pop culture support. We should consider a similar strategy and dress up a few company vans and send specially trained marketing specialists on the road to demonstrate Bumpzinger 5000's range of super-cool street moves.

Between a price reduction that's just in time for summer and a few company vans supplied with Bumpzinger accessories, our sales team feels strongly that we can cut our losses and take back market share we lost since last year's rally.

I hope this report has been useful, and urge you to approve the price cut proposal as soon as possible so we can regain our competitive edge.

4 – Elements of a Press Release Guidelines

The challenge facing the writer of a press release is to evoke reader interest, care, or concern while conveying a memorable message or impression. At a minimum, the press release answers the Who, What, Why, Where, and When questions, but the structure of the press release doesn't need to flow in such a linear fashion. In fact, when you write a press release, whether you are promoting an event or plugging a product or detailing your response, it is best to let the information unfold like you are telling a story—packing as many of the most compelling details into as few column inches as interestingly as possible.

Example:

FOR IMMEDIATE RELEASE:

Contact: Dawn Braekke
Clock Radio Corp
100-000-0101 OFFICE
100-888-0000 FAX
dawn.braekke@clockradio.com
www.clockradiocorp.com

Warning: Your Alarm Clock Is Unhealthy For You

New alarm clock creators say waking too fast isn't as healthy as waking gradually.

Looking for a fresh excuse why you're not arriving at work on time? Tell your boss it's because you've banished your alarm clock buzzer. Does that sound unbelievable? According to the makers of the Un-Alarm Clock™, waking up matters.

Tactile Technologies, Inc., a Texas based company responsible for the controversial live action game Taser Tag™ has created an alarm clock called Un-Alarm Clock™; it's designed to wake you up with subtle human-like touching mechanisms based on a technology called Technotouch™. The subtle movements are meant to help people wake up more gradually rather than be jolted awake by a sudden asymmetric noise.

"Technotouch™ is based on over 8,238 digitally-produced samples of different degrees of human touch," says inventor Fern Featherby who, along with co-inventor Bryan Anvil, invented the Un-Alarm Clock™." We wanted the robot arm touch of the Un-Alarm Clock™ to feel like real human touch patterns, for maximum realism and effect."

The Un-Alarm Clock™ is a sleek, faux-chrome, oval disc featuring a simple yet elegant array of shiny, modern-looking buttons. It can be set to three different settings: poke, nudge, and tickle. Like the settings' names suggest, the alarm clock can actually "poke" you gently with a robot finger. Or it can softly nudge your shoulder using a humanoid device that mimics human hand movement. Using a special electromagnetic moving brush, it creates tickling sensations to help ease you into the day.

Anvil says The Un-Alarm Clock™ is more effective than audio alarms because it allows you to wake up at your own speed. "When your alarm buzzer goes off, you're essentially 'shocked' into waking up," he says. "But you are not fully awake. Sleep studies show that sudden artificially-induced transitions from deep sleep to a waking state can actually cause you to wake up less effectively. The Un-Alarm Clock™ wakes you gradually, giving you time to transition from a natural sleep into a wake state—resulting in a more complete and refreshing waking experience."

Example 5 – Business Plan and Executive Summary – Description

Purpose
A business plan offers a comprehensive description of your overall business operations. It can be used internally as a way to coordinate actions or establish identity. A business plan can also be used to solicit financing for a new startup business. If you were the proprietor of a new business and looking for a loan, one of the first questions you would expect a loan officer to tell you is "Let's have a look at your business plan."

A typical business plan will feature these elements:

- **The Executive Summary**
  This is the brain of the business plan. It presents the main ideas of the whole plan without providing too many details. The executive summary is sometimes written last.

- **Industry Overview**
  Now take a step back and look at the industrial context of your business. Tell us who the other companies are, what they are doing, and what big picture industry needs your company will build its reputation providing.

- **Market Analysis**
  Here you explain who your target market is and what product or service your company is going to pride itself on providing. Make sure to include details about the demographics of your specific target market, their locations, and how their needs are being met now—even if you thought you just finished explaining it in the industry overview. Here is your chance to explain how your business will serve people at the individual or street or community level.

- **Competitive Analysis**
  There are people across the street who sell the same stuff you plan to sell. The folks on the other side of town provide the same service you do—and dare to think they do it better! Tell us about them, what they do, how well or shabbily they do it. This is your opportunity to pretend to be a corporate spy reporting about what you've seen in enemy territory. This is your socially acceptable moment to gossip about your competitors...but don't forget to

explain how you and your people will crush them to BITS!—or perhaps, ahem—*supplement* what they do, or coexist in some mutually beneficial way that allows you to compete yet inspire the best in each other.

- **Marketing Plan**
  How are you going to get word out about your most excellent business? Your marketing plan talks about the giant blimps you're going to rent, all the refrigerator magnets you're going to make, all the word of mouth campaigns you're going to instigate, all the street theater publicity stunts you're going to stage, all the press conferences on the rooftops of buildings you're going to coordinate. The marketing plan includes these ideas plus some ideas about the cash marketing representatives will need to carry out these activities.

- **Management Plan**
  Tell us about your organization chart. How do you structure your team's leadership? How do they relate to each other? What is the proverbial chain of command? Who reports to whom? What resources do management have in-house to resolve issues or conflicts that may arise? Who is the ultimate decision maker?

- **Operations Plan**
  Here you get to tell us about your building's address and the neighborhood your building is located in. Or, if your employees telecommute, you can tell us about that. Tell us about specific equipment you'll use and who you buy your equipment from. Assuming I was your soon-to-be banker, this is the section I'd be asking you to tell me about how you plan to make your product or provide the training that you'll need to give your staff who will be serving your clients.

- **Financial Plan**
  Last of all, tell us about how much money you'll need to startup, how much you'll need to stay in business, how much you plan to make, and how you plan to report on your financial details. This section is more than show me the money—it's asking you to tell me where the money comes from and where it is going.

Example:

Executive Summary
Club Moss will be the first nightclub in the country that purposefully and explicitly integrates high culture club dancing with cutting edge environmental awareness.

- Club Moss will be the first new club to open since 1999. With the club age population (18-24) of Des Moines growing at a steady average of 2.4% per year—coupled with one of the best university horticultural programs in the country—the demographics are ripe for a new nightclub with an environmental theme.

- Over 27,000 moss growers currently live in Des Moines. Club Moss aims to focus on the need for environmentally-minded young adults to socialize and network in a place where technology and biology coexist.

- Club Moss will not compete directly with other nightclubs who cater to the 18-24 crowd—rather, Club Moss will expand the target market by providing a club where an environmentally conscious clientele will feel welcome to participate in the night scene.

- Our marketing efforts will focus on two basic strategies: social networking space for young environmentalists and environmentally sound space for these social interactions.

- Club Moss will occupy a pre-existing building that includes a front entry, a main room, a bar, and a greenhouse. A system of streams and waterfalls will connect the rooms in the building with holding ponds that contain freshwater aquatic life. Iindoor tropical plants, mosses and mushrooms will also be placed throughout the club.

- By the end of the first year, we project a gross monthly income of $60,000 and a monthly operating costs of $47,000.

The Industry
There are currently three large venue clubs in business now, and none of them has been renovated since 1993. There has been only one new club added to the matrix of downtown venues since 1999. Clearly, with the population of Des Moines growing at a steady average of 2.4% per year—coupled with one of the best university horticultural programs in the country—the demographics are ripe for a nightclub with a strong horticultural theme.

There has been only one new club added to the matrix of downtown venues since 1999. Clearly, with the club age population (18-24) of Des Moines growing at a steady average of 2.4% per year—coupled with one of the best university horticultural programs in the country—the demographics are ripe for a new nightclub with an environmental theme.

Market Analysis
A recent survey in the local horticultural magazine *American Moss* showed an unusually active concentration of moss growers in the Des Moines, Iowa—over 27,000 moss growers. Like cigar bars serve cigar afficianados and car shows serve vintage car owners, Club Moss™ aims to focus on the need for environmentally-minded young adults to socialize and network in a place where technology and biology coexist.

Competitive Analysis
This nightclub does not aim to compete directly with other nightclubs who cater to the 18-24 crowd—rather, Club Moss wishes to expand the target market (i.e., clubbers) by providing a club where a slightly older clientele will feel welcome to participate in the night scene. In particular, the ambient noise levels in Club Moss will be 30 decibels lower than the music in typical nightclubs—which will encourage conversation and networking, rather than just music and drinking.

Marketing Plan
Our marketing efforts consists of two basic strategies. The first strategy is to establish Club Moss as the premier social networking space for young environmentalists. The second strategy will feature a more generalized advertising approach—to inform college-aged youth about a new kind

of nightclub where you can take off your shoes and dance on a floor made of mosses, lichens, and non-slippery algae.

Management Plan
The management team will consist of a General Manager and two Assistant Managers who are guided by a five member Board of Directors.

Operating Plan
Club Moss will be located on 4310 Flat Hills Drive in downtown Des Moines. We will occupy the building where Dollar Barrel used to operate. The building consists of a front entry, a main room, a bar, and a greenhouse. The front entry will serve as a gathering place; the mainroom will be a place for sitting and conversing; the bar area will feature tables and a traditional bar; the greenhouse will feature tables and different plants. Connecting all the areas will be a system of streams and waterfalls powered by a 5000 ppf water pump refreshing seven separate holding ponds. Each pond will feature a different species complex of various freshwater aquatic life. In addition to over 100 species of indoor tropical plants, over 17 species of mosses and mushrooms will be displayed under growing lights and humidity tents throughout the club.

Financial Plan
Our capital campaign has raised over $80,000 in startup monies. To complete repairs and install the basic interior design elements, we seek $800,000 in additional funding to design the club according to our vision. By the end of the first year, we project a gross monthly income of $60,000 and a monthly operating costs of $47,000.

6 - Elements of a Case Study and Their Organization

The case study is a remarkable form of writing. It acts as a kind of hybrid writing genre—part story, part essay, and part scientific report. Investigation usually forms the basis of the case study. It takes a single scenario, an individual experience, or one organization—and describes it in detail. Looking at it this way, the case study behaves as a kind of written documentary by providing a lens into a single experience, event, or organization.

As you write your case study, you play the role of investigator/analyst. Your task is to report the details as they appear to you in the form of data, research, interviews, meetings, or whatever your sources may be. Your task is to compile the sources, compare your findings with other findings or other established conclusion, and eventually come to a conclusion, usually in the form of a recommendation, that respects or integrates a variety of perspectives.

Please note that there are multiple forms of case study; one format does not fit all. The following is just a basic (and truncated) guideline to a generalized case study. In other words, in some case studies, sections could be added and other sections could be subtracted, or the order of information could be changed, depending on the purpose and/or audience for whom the case study is intended.

Sample Elements and Organization of a Case Study

Title

The easiest way to develop a title for a case study is to state the facts. For example, if you are studying the development of a new business that's based on a cooperative model, then your title could simply be *The Development of a Floral Business Based on a Cooperative Model*.

Add a subtitle if you want your title to be more descriptive.

Example
The Development of a Floral Business Based on a Cooperative Model:
An analysis of the integration of non-profit principles in the profit sector

Elements of a Sample Case Study
Since case studies are written for highly specific reasons, several different case studies could be written about the same organization for different reasons—and for different audiences. One case study could have a sociological approach by studying "Organization A" from a cultural perspective. Another case study could look at Organization A from a purely financial perspective, resulting in a case study that's organized around certain action steps. Another case study could study a certain smaller group or individuals within Organization A who are affected by a recent restructuring.

Whatever the purpose of a case study may be, the following elements offer a few ideas to grease your case study wheels:

- **Project Description**
- **Objective and Goals**
- **Timeline**
  Here is where you want to give your reader the broad overview of this study. But don't give too many specific details at this point—your reader is not quite ready yet. Here you want to explain what subject area this study falls under and/or what discipline. In general terms, explain the driving force behind this study. Without going into sundry details, tell me what I should know before reading further. The point here is that this section should be simple, short and brief—and attract the reader into reading more.

- **Background of Individual, Culture, or Organization**
- **Statement of Issues, Problems, Challenges**
- **Research/Data**
- **Discussion of Solutions or Strategy**
  As you transition from introductory sections to the body of your paper, you open the floodgates of details. You describe the location, the culture, the purpose of the person or people or organization you're writing about. You talk about their history, culture, structure, and status. What are the problems facing this organization or that individual? Or perhaps you want to think about the elements of this section as fragments of a SWOT analysis (Strengths, Weaknesses, Opportunities, Threats). Sections within the body of the paper provide this kind of information, as well as a discussion section where you integrate different ideas that move toward your final section.

- **Recommendations of Action Steps**
- **Implementing Action Steps**
- **Results**
- **Future Recommendations**

  Finally, after working through all the data and describing all the research and combing through the details....the final sections of your case study unfold as you reach toward the objectives you stated in the introductory section.

  By now, you've developed a broad base of knowledge about the subject area you are writing about; now you can begin to make recommendations for actions steps, if that is what you are going for. Now you can describe the process you went through as you implemented those actions steps. Finally, you can report results of the Actions Steps you might have taken (or recommend should be taken) as you discuss ways to approach today's issues to prevent similar problems in the future.

Example:

Project Description

The focus of this project involves the current state of internal communications of JuiceBox Corporation and to make recommendations for improvements.

Objective and Goals

Our objective is to examine JuiceBox Corp's internal communication process and discover strengths and identify weaknesses. To reach this objective, three goals will need to be met:

- Survey employees at all levels of the company regarding their communication practices;
- Develop a set of criteria for effective versus non-effective communication practices;
- Report communication areas that are working and those which improvement.

Timeline

One week should be allotted to develop the survey. After the survey has been developed, three weeks should be committed to allow employees to respond. During this time employees will be selected at random for more extensive interviews. Once the survey and interviews have been conducted, four weeks will be needed to compile and analyze the results. We expect the analysis process will take between two to three weeks. All the steps in this study will take a minimum of 10 weeks and a maximum of 12 weeks to complete.

Background

JuiceBox Corporation (JBC) is a multinational design firm that provides a wide range of specialized communications support for large multinational corporations. Founded in 1992 as simply Box Corp, it began as a six-person public relations firm offering small businesses marketing tools at reduced prices. As JBC's reputation for affordable communications support and commitment to service grew, so did their client base. In 1997, after only five years in business, Box Corp developed into a competitive design house, employing 65 people and opening its first branch office in Toledo. In 1998, BoxCorp's won its first Peabody Award, and began to attract the attention of corporate clients. The following year, Box Corp experienced unusually rapid growth as it opened other branch offices in Detroit, St. Louis, and Minneapolis.

By 2002, BoxCorp engaged in a friendly merger with its then-competitor Juice Unlimited, and the two firms fused to become the now infamous design powerhouse JuiceBox Corp (JBC), one of the western hemisphere's premier communications design houses.

Issues, Problems, Challenges

The rapid rise and expansion of the JuiceBox Corp employee roster and center of operations made it extremely difficult for the newly merged corporation to maintain the level of intimacy that was experienced when the two firms were smaller local companies. As projects grew larger and more diversified, collaborative groups who were used to working with each other—were reorganized and reassigned. As a result, many of these relationships broke down and became less effective when individuals were placed in other working groups. The executive team thought that new collaborations and new relationships would create new relationships and new synergies. However, they did not take into account that stable, trusting partners in highly collaborative work are essential to the success of creative projects.

The greatest problem facing JBC now is developing the interpersonal skills set of JBC employees in order to restore close creative partnerships that were lost before the merger. By developing the interpersonal skills, and developing a plan for creating social interactions outside work time, JBC executives hope to establish JBC as the kind of "communication culture" that it was when it was a smaller, less populous company.

Research/Data

According to sociologist Miles Waters, a strong network of interpersonal relationships are critical to the healthy functioning of the organization. A workplace culture that values relationships has a competitive edge over an organization where employees feel less connected to each other. The survey conducted at JBC seems to support this. The frequency of formal and informal meetings determines whether relationships are maintained. Before the merger, over 85% of JBC employees reported either a formal or informal meeting at least once a week; 35% reported meeting twice or more weekly. After the merger, only 45% reported meeting once a week, and a mere 8% say they met twice or more a week.

The form of communication also seems to matter. Before the merger, 78% reported that they preferred communicating by talking in person or by phone, and only 18% say they preferred to communicate by e-mail. After the merger, only 54% say they prefer communicating in person or by phone; an astounding 42% say e-mail is their preferred form of communication.

Discussion of Solutions or Strategy

There are at least two main factors that seem to be affecting JBC communication culture—the fact that meetings are taking place less frequently and face-to-face communication is happening less frequently than electronic communication. The company is eager to see more meetings and more face to face interaction among employees. However, executives are hoping to avoid establishing "mandatory" meetings or creating policies to require employees to engage with each other in a prescribed way—they would much rather see relationships form organically without too much interference from management.

Recommendations of Action Steps
The problem is not so much a lack of communication as much as a lack of *direct* interpersonal communication. The challenge is to develop a balanced approach to encouraging face to face communication without insulting employees' intelligence or getting in the way of work that does not require meetings—too many meetings are just as unproductive as not enough. After its merger, JBC will need to learn how to function like a single company rather than two individual parts fused together; employees have overwhelmingly expressed the need for a greater sense of community within the company.

Implementing Action Steps
JBC 's leadership should be expecting changes from every employee. JBC needs leadership to recognize the importance of communication not only as a way of doing business, but also as a part of healthy social interaction. The company needs to establish a core of highly socialized individuals who are adept at organizing formal and informal social gatherings. The more shy and/or anti-social members of the rank and file needs to take responsibility by responding to and participating with efforts to establish a stronger community.

In the past, the company sponsored Annual Company Meeting, the Employee Banquet, and the Summer Slackfest. It is likely that more of a conscious effort to develop strong communications resulting from strong relationships will be necessary. However, it is known that the day to day problem of communication will require an effort on the part of employees who want to see an improved communication culture develop. To encourage this, informal monthly brown bags will be held to open up dialogue about the kinds of communication that work and to discuss ways to improve internal interactions.

Measuring Results
With a full calendar of company-wide social activities coupled with a higher frequency of section or division-level meetings and/or after work gatherings, employees who are looking for greater community within the workplace should be able to find opportunities to interact with co-workers. In addition, if the company follows through with informal brown bags, employees should have yet another forum to discuss ways to create more opportunities for interaction. Having a section in the company newsletter dedicated to interactions should also emphasize the importance of meetings, and direct contact—not just e-mailing or leaving voice messages. The final results of these action steps should be measured with a second survey that should be distributed in 2008.

Future Recommendations
The overall health of a complex organization is enhanced with strong interpersonal communications. JuiceBox Corp is a company that specializes in communications, but this does not mean that it is immune from challenges of maintaining healthy communicative practices in an age where technology can enhance but also interfere with developing real and meaningful workplace relationships. JBC should:

- encourage individuals within its company who have strong interpersonal skills to take time to use them in the workplace;
- ensure that the subject of person-to-person communications remains a part of the company-wide discussion;

- establish a Communications Committee responsible for observing how groups within the company interact with each other;
- Communications Committee members should have license to attend open door meetings and publish articles that identify effective communications practices.

7 – White Paper – Description

The white paper is an authoritative and comprehensive report. Its format and style depends on the audience for whom it is intended—it can be for specialists or for the general public. For example, the government of Australia published a white paper in 2003 titled *Advancing the National Interest* which was intended to be "...a comprehensive assessment of Australia's place in the world and articulation of the Government's strategies to protect and promote the security and prosperity of Australia and our people."[1] The white paper is available for public viewing, but you could argue that Australian politicians and foreign policy makers might have had a much more specialized audience in mind when they wrote it—an audience of economists and businesspeople, for example, rather than lay people.

Commercial white papers can be written for various reasons. A satellite communications corporation might create a white paper to describe how emerging technologies will affect the communications market for the next decade. White papers can be co-authored as well. Groups of non-governmental organizations like, for example, the American Red Cross and partner organizations might co-write a white paper about their ability to coordinate an emergency response for simultaneous biological attacks.

The basic idea here is that a white paper is a report that provides a substantial—and authoritative—description of your subject.

Organization of White Paper
Like most forms of writing, the white paper can be organized in three sections—introduction, body, and conclusion. Within this basic framework, there are many ways a white paper can be constructed. The following organization model provides just one of many possible organizations and possible elements within each section.

Introduction
 - Foreward/Overview
 - Definitions
 - Statement of problem
 - Background/History of Organization or Product

Body
 - Examples
 - Implications

[1] Australian Department of Foreign Affairs and Trade. *Advancing the National Interest*. Retrieved July 10, 2007 from http://www.dfat.gov.au/ani/

- Projection or Forecast
- List of Choices or Paths to Take

Conclusion
- Description of Action Steps
- Summary of the Situation
- Call to Action
- Reiteration of the Message of the Introduction

Example:

Purpose
The current state of machine vending activity in the United States and certain Caribbean countries is in flux. Several new vending authorities have emerged on the international stage, effectively disrupting the stability of an otherwise untouchable market. This paper aims to provide a comprehensive evaluation of the recent vending market instability and offer a set of recommendations for the Midwest Vending Alliance's Board of Directors as they create a well-informed ten-year strategic plan.

Values
The Midwest Vending Alliance (MVA) is built on a business model that boasts a high level of intimacy with clients and client representatives. The spoke-like organizational structure of the MVA—which is based in four distinct areas—reflects the close relationships that MVA wants to establish with clientele. Despite the No-Touch™ vending technology, MVA has been able to maintain a 3.6% average growth rate for the last eight years—which client surveys attribute directly to the unique level of service MVA associates provide.

Regional Competition: A Growing Threat
Until the year 2006, MVA enjoyed a business era with virtually no competition. With the rise of *Penny Plunker Associates* and *Black Hole Vending*—two small but developing machine vending startups—lack of competition is not an excuse to ignore new vending technologies improvements, such as No-Touch™ and Coin Return™ technology. The latest report by the Quarterly Group, a group of vending business consultants, strongly recommends that the MVA establishes a new policy of expansion and aggressive business tactics like as account fishing and cold calling. In other words, the values of cooperation and gradual business growth will need speedy revision as new opportunities and emerging threats (like smaller, faster companies) present themselves.

Regional Expansion: A Rare Opportunity
For 20 years, the Midwest Vending Alliance (MVA) has developed a solid business structure in the following five states: North Dakota, South Dakota, Minnesota, Iowa, and Wisconsin. Certain Caribbean countries have also been targeted—Jamaica, Puerto Rico, and the Dominican Republic. Lack of competition has allowed MVA to operate virtually unopposed by any serious vending competitor.

The lack of serious competition and steady increase in the vending market has enabled MVA to sustain and maintain clients on gradual growth models where service quality is the primary key to success. However, with higher gasoline prices and two upstart vending businesses moving aggressively into secure MVA territory, members of the Board should be aware that the new businesses may pose a threat to MVA's relatively secure dominance of the United State's vending needs, and the relatively isolated vending needs of the Caribbean island nations.

Action Steps

With new competitive forces looming on the horizon, the machine vending market is promising to offer more competitive pricing. Midwest Vending Alliance should prepare itself by immediately lowering prices of current clients and by aggressively seeking new clients by offering conversion rates. MVA sales representatives should now consider competitor territory fair game and solicit new clients from accounts currently managed by competitor vending services.

In the frenzy of garnering new clients, care should be taken not to diminish services currently offered current clients—otherwise the strategy would be undermined. Every effort should be made to retain and improve service. Managers should develop customer feedback plans to help ensure that the highest quality service is provided. Perhaps most importantly, our sales staff will need additional training to ensure their ability to struggle for accounts.

Conclusion

In the new vending market, we should expect not only more capable competitors, but we should expect competitors who will aggressively seek our market share. This is not a local trend; this is a widespread market shift, and we need to prepare ourselves accordingly. To enhance our competitive edge, we will need to re-learn how to be competitive; Midwest Vending Alliance needs to develop practices for protecting our current business as well as growing new business. It can no longer be assumed that our current client base will automatically remain as stable as it has been for the last 12 years. With the rise of less expensive upstart companies, MVA must find ways to leverage its 30 years of vending experience and reliability while offering affordable service. Striking the precise balance between quality and affordability will be the ultimate challenge that will ensure MVA's future or guarantee its demise.