MBA Mandatory Writing Guide

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CONTENTS

LIST OF MICROSOFT WORD TIPS

EXECUTIVE SUMMARY

The *MBA Mandatory Writing Guide* was created to help MBA students write more professional documents. The chapters and sections, outlined below, provide useful guidelines and strategies for a range of writing components.

Business Writing Primer
The short primer distills the essential characteristics of business writing. A short table outlines the differences between academic and business writing.

Style and Grammar
This chapter provides extensive guidelines for grammar and style to help students to write more professionally and without errors. Areas covered include commonly misused words, frequently misspelled words, pronouns, numbers and dates, punctuation, and capitalization, among others.

Mechanical and Formatting Issues
Poor mechanics or formatting may affect the perceived quality of any paper. This chapter provides instructions regarding elements such as spacing, pagination, binding, fonts, and footnotes or endnotes.

The Written Narrative: Styles for Common Formats
This chapter achieves two goals: first, guidance in the organization and development of ideas within a text (the written narrative), and second, description of the purpose, characteristics, and elements of various document formats common to the MBA program.

Using Material with Integrity
Intellectual property is an important consideration when writing. This chapter explains how to use borrowed material appropriately and covers quoting and paraphrasing.

References Guide
Referencing sources in the body of the paper requires correctly citing the source in the text and providing reference information at the end. This chapter offers instructions on APA referencing style for a variety of sources.

Revision Strategies
Revision is an essential step in writing and one frequently overlooked. This section provides strategies for revising more effectively and efficiently.

Quick Guides
The appendices provide the following information: revision checklist, proofreading marks, state abbreviations, terms of reference for Loyola University New Orleans, grading rubrics, and a list of resources.

Microsoft Word Tips
Throughout the guide appear boxes containing useful tips for using Microsoft Word more effectively.

INTRODUCTION

Why does the Loyola MBA program need a style guide?

A universally accepted method for preparing papers for submission to professors does not exist, leaving students uncertain of the correct forms. An MBA style guide will provide valuable information.

Additionally, many students have never been taught any method for preparing papers. Many professors and business people point to the lack of written communication skills as a major shortcoming of college and MBA program graduates. These guidelines will help students enhance writing abilities by providing a methodology for preparing professional documents.

Why is it important to have strong writing skills in the workplace?

Written communication is a crucial part of business. Reports, proposals, e-mails, presentations, marketing materials—rare is the business that has no need for written communication. Just as a person's attire and way of speaking create an immediate impression, so too does one's writing. In the fast-paced business world, writing must communicate clearly and quickly as well as exemplify professionalism. Errors, wordiness, and sloppiness can cause excellent ideas to be overlooked. To succeed, MBA students must learn to write effectively.

BUSINESS WRITING: A PRIMER

Just as fiction differs from non-fiction, business writing differs from the academic writing style prevalent in university courses. Here are the essential characteristics of business writing:

Concise

Brevity is essential in business writing because few people have time to read long reports word for word. Brevity does not mean a lack of information. Business writers should include as much *pertinent* information as possible with as few words as possible, without losing clarity. This means identifying the most important information to include and later revising to refine the sentences further.

Applied, Not Only Informative

Business writing presents information but goes further to *apply* this information. Decision-making is a priority, and a document should present a solution or a recommended action. Writers should articulate the expected action of the reader: a reply to the e-mail, a change to the project, acceptance of the contract, etc.

Oriented to the Audience

Consideration of the intended audience directs the writing. Writers should prioritize information for the reader, asking what information the reader would find most important. Business writing also works to maintain good relationships; writers should strive to appeal to readers by using appropriate vocabulary and presenting a positive message.

Easy to Navigate

Along with being concise, business writing needs to be easy for the hurried reader to navigate. Writers should construct a logical order of ideas and use headings (graphic highlighting) and signal words (for example, *first, therefore, in conclusion*) to help the reader to find information and grasp the message quickly.

Professional

Sloppy, error-riddled writing rarely receives more than a passing glance. Writers should edit carefully to catch errors and should format documents to look crisp and visually interesting (without being distracting).

BUSINESS VERSUS ACADEMIC WRITING:
A QUICK REFERENCE GUIDE

Topic	Academic	Business	Reference Page
Binding	For informal, weekly assignments, a staple in the upper left-hand corner is acceptable. Final or semester-long projects may require professional binding.	The extra step of professional binding for a presentation is almost always the norm.	30
Cover Page	Title, name, professor's name, course title, date, institution's name. Professional look.	Title, name, company logo, addressee's name, addressee's company name if applicable, date. Creative, professional look, possibly with color ink.	43
Passive vs. active voice	Active voice is preferred to create clear sentences.	Active voice is preferred, but passive voice is acceptable to avoid placing responsibility of an action on one person.	10
Spacing	Double-space	Single-space	28
First-person pronouns	Do not use.	Acceptable only when the referenced noun is absolutely unambiguous.	12
Headings	Very limited. Usually in longer documents.	More common and encouraged. Allows for quicker grasp of content.	29
References and citations	Important part of showing an understanding of topic.	Unnecessary unless requested or if using specific data.	55

CHAPTER ONE
STYLE AND GRAMMATICAL ERRORS

Errors made in style and grammar seriously damage the credibility of the writer(s) and the entire document. The following sections provide direction in what errors to avoid and in what constitutes strong business writing.

No substitute exists for careful and thoughtful proofreading of any document. Chapter Six provides guidelines for revision.

SECTION 1: INEXCUSABLE ERRORS

This section highlights the most egregious writing errors. Refer to the other sections of this chapter for further information on writing correctly.

Misspelled Words and Grammatical Errors

- **Misspelled words.**
  A list of commonly misspelled words can be found on page 10.

- **Double negatives.**

  Incorrect: *We <u>didn't do nothing</u> to deserve this.*
  Correct: *We <u>did nothing</u> to deserve this.* – OR – *We <u>did not do anything</u> to deserve this.*

- **Subject and verb disagreement.**

  Incorrect: *The <u>data is</u> analyzed.*
  Correct: *The <u>data are</u> analyzed.*

  Incorrect: *The continuing <u>preservation and translation</u> of these records <u>forms</u> a necessary chapter in the history of this company.*
  Correct: *The continuing <u>preservation and translation</u> of these records <u>form</u> a necessary chapter in the history of this company.*

- **Split infinitives.**

  Incorrect: *The investigator has the evidence <u>to undeniably prove</u> the cover-up.*
  Correct: *The investigator has the evidence <u>to prove undeniably</u> the cover-up.*

- **Hanging Participles.**
  The participle describes an action; the person or entity performing the action must immediately follow the comma.

  Incorrect: *When writing a contract, <u>the use of nicknames</u> can make identification of the parties easier.* [Who is writing the contract?]

Correct: *When writing a contract, <u>the drafter</u> may use nicknames to identify the parties more easily.*

Vague Language

- **Pronouns.**
  Avoid pronouns in formal business writing. Further discussion of pronouns can be found in Section 7.

  Incorrect: *The CEO does not support doing <u>it</u> immediately.*
  Correct: *The CEO does not support implementing the changes immediately.*

- **Placeholder phrases "there is," "there are," and "it is."**
  These phrases are "passive" and weaken the sentence.

  Incorrect: *<u>There is</u> a problem with the data.*
  Correct: *The data have a problem.*

  Incorrect: *<u>It's</u> not just business that will undergo a shift in strategy*.
  Correct: *Not just business will undergo a shift in strategy.*

- **Verbose or ambiguous terms and expressions.**
  Business writing should be brief and straightforward.

  Incorrect: *The team faced a concerning realization that profit margins were decreasing.*
  Correct: *The team realized that the profit margins were decreasing.*

> **LEARN MORE** The resource handout "Avoiding Vague Language" provides strategies to strengthen weak and vague sentences.

Repetitive or Redundant Phrasing

- **Two short sentences that could easily be combined into one sentence.**

  Incorrect: *Harvard planned to keep the investments for 10 years. It sold them after seven.*
  Correct: *Harvard planned to keep the investments for 10 years but sold them after seven.*

- **Several sentences in a row beginning with the same word or phrase.**
  Such a structure is only acceptable when done deliberately and sparingly for emphasis.

  Incorrect: *I will now try this tactic. I will try to examine what the competitor values…*
  Correct: *I will now try the tactic of examining what the competitor values…*

- **The same word ending one sentence and beginning the next.**

  Incorrect: *The CEO finds himself under a cloud of mistrust. This mistrust could taint his legacy.*
  Correct: *The CEO finds himself under a cloud of mistrust that could taint his legacy.*

6
Colloquial or Informal Language Structures

Always maintain a professional tone. Avoid using a conversational tone and informal language in business writing unless corresponding in an informal context with a well-known acquaintance.

- **Conversational tone or phrases.**

    Incorrect: *As you know, not all members endorse this approach.*
    Correct: *Understandably, not all members endorse this approach.*

- **Colloquial expressions.**
    If a colloquial expression is unavoidable, then show in quotation marks.

    Incorrect: *The estimate was right on the money.*
    Correct: *The estimate was accurate.*
    Correct: *The consultant team was asked to provide a "big-picture" analysis of the company.*

- **Colloquial two-word verbs.**

    Incorrect: *The statistics team will put in data.*
    Correct: *The statistics team will enter data.*

- **Prepositions at the end of sentences.**

    Incorrect: *The company needs to decide which demographic group to market to.*
    Correct: *The company needs to decide to which demographic group to market.*

- **Contractions.**

    Incorrect: *Chrysler doesn't want vehicles to crowd up dealers' lots.*
    Correct: *Chrysler does not want vehicles to crowd up dealers' lots.*

SECTION 2: COMMON CONFUSING WORDS AND PHRASES

- **affect** versus **effect**
  Generally, "affect" is a verb and "effect" is a noun.

  A high employment rate may <u>affect</u> the election.
  Lowering the product price may have a positive <u>effect</u> on the profit margin.

- **cf.** versus **e.g.** versus **i.e.**
  The abbreviation "cf." refers a reader to a source that confirms a fact. The abbreviation "e.g." means "for example." The abbreviation "i.e." means "in other words." A comma or dash should follow "e.g." or "i.e." (not "cf."). All three abbreviations should be italicized and can be offset by commas, dashes, or parentheses.

  All Americans have the right to an attorney, regardless of whether or not they can afford one (c*f. Gideon vs. Wainwright*).
  Late work will not be accepted without an appropriate excuse —*e.g.,* illness or family death.
  The president ate at the most expensive restaurant in town, *i.e.,* Kirby's.

- **first, second, third** versus **firstly, secondly, thirdly**
  "First," "second," and "third" are preferred.

- **however**
  Use "however" *only* when meaning "in any possible manner." Otherwise use other phrases, such as "nevertheless," "but," or "on the other hand."

  The debt ceiling issue must be addressed, <u>however</u> difficult negotiations may be.
  Negotiations over the debt ceiling will be difficult <u>albeit</u> necessary.

- **in order to**
  Use "to," unless indicating a sequential or causative relationship.

  <u>To increase</u> home profits, neighborhoods should improve local amenities.
  <u>In order</u> for us <u>to</u> unlock the door, the building manager must arrive; he has the key.

- **its** versus **it's**
  "Its" is the possessive form of "it." "It's" is the contracted form of "it is."

  The fund will open <u>its</u> books to annual independent audits.
  Nokia has not indicated whether <u>it's</u> considering selling.

- **less** versus **fewer**
  Use "less" for quantity and "fewer" for number.

  The new airplane has <u>less</u> floor space than the original yet contains no <u>fewer</u> than 100 seats.

- **like** versus **such as**
  Use "such as" instead of "like" to show similarity or to list examples.

  The newer models will showcase green technology, such as solar water heaters, programmable thermostats, and dual-flush toilets.

- **more/less/fewer than** versus **over/under**
  Use "more than" or "less than" when referring to numbers or amounts. Use "over" or "under" when describing the physical position of an object.

  Customers must have <u>more than</u> $1,000 in their account to qualify.
  The plane flew <u>over</u> Chicago.

- **than** versus **then**
  "Than" joins two items in comparisons. "Then" refers to a point in time or sequence.

  Apple was more successful <u>than</u> Microsoft at marketing a digital music player to teens.
  You must develop a proposal and run it by your boss; <u>then</u> you can put your idea into action.

- **that** versus **which**
  Use "that" with restrictive clauses, which provide necessary description of the word or phrase being modified. Use "which" with non-restrictive clauses, which provide non-essential information. Use commas only around non-restrictive clauses.

  The Green Bay Packers is the only NFL team <u>that</u> is owned by a community.
  The FIFA World Cup, <u>which</u> occurs once every four years, was held in South Africa in 2010.

- **their** versus **there** versus **they're**
  "Their" is the possessive form of "they." "There" indicates a place or position. "They're" is a contraction meaning "they are."

  Compounding pharmacies have attracted attention because of <u>their</u> link to a meningitis outbreak.
  Tourists flock to the café because celebrities frequently go <u>there</u>.
  <u>They're</u> pushing the boundaries on car design.

- **think** versus **feel**
  "To think" is an expression of thought. "To feel" is an expression of emotion.

  The department thinks that the EuroMIC plan has the most potential.
  The department feels relieved that the merger proceeded smoothly.

- **try to** versus **try and**
  Use standard "try to."

  The team must <u>try to</u> develop a marketing strategy that stays within budget.

- **with regard to/regarding** versus **with regards to**
  Use "with regard to" or "regarding" instead *regards* with an [s].

  I would like to ask your opinion regarding the new Farm Bill.
  With regard to the next agenda item, we should run more pilot tests before moving into production.

- **your** versus **you're**
  "Your" is the possessive form of "you." "You're" is the contracted form of "you are."

  The newspaper will print <u>your</u> op-ed piece on local consumerism.
  I think <u>you're</u> going to enjoy this task.

SECTION 3: FREQUENTLY MISSPELLED WORDS

absence	conscious	February	knowledge	probably
accommodate	correspondence	foreign	maintenance	profited
acknowledgment	courteous	government	manageable	prominent
all right	defendant	grammar	maneuver	questionnaire
a lot	definitely	guarantee	mileage	receipt
altogether	dependent	harass	miscellaneous	receive
automatically	dissatisfied	height	necessary	recommendation
bankruptcy	embarrass	immediate	nevertheless	remittance
canceled	emphasis	independent	noticeable	schedule
changeable	exaggerate	indispensable	pamphlet	secretary
committee	existence	irrelevant	permanent	separate
congratulate	extraordinary	itinerary	prevalent	sincerely
conscience	feasible	judgment	privilege	unnecessarily

SECTION 4: FREQUENTLY MISSPELLED TECHNICAL WORDS

blog	log off (v.)
database	logon (n.)
e-mail	log on (v.)
homepage	online
Intranet	podcast
Internet	voicemail
login (n.)	Web log
log in (v.)	Web page
logoff (n.)	Web site

LANGUAGE NOTE	Note how compound verbs such as *run through* or *check out* are written as **two separate** words. Conversely, the noun forms—*run-through* and *checkout*—are written as one word.

SECTION 5: ACTIVE VOICE AND PASSIVE VOICE

The difference between active and passive voice is based in the structure of the sentence. An active sentence structure starts with the person or entity performing the main action (agent) and then has a verb describing the action. A passive sentence structure may or may not identify the agent but uses the verbal structure [BE + verb] to describe the action. Examine the two sentences below:

Active voice: *The manager <u>stopped</u> allowing merchandise returns for cash refund.*

Passive voice: *Merchandise returns for cash refunds <u>have been prohibited</u>.*

In the active sentence, the acting agent (*the manager*) has been clearly identified and the action described (*stopped*). In the passive sentence, the acting agent is not identified. The subject of the sentence (*merchandise returns*) is in fact the recipient, or object, of the verb (*have been prohibited*).

Business (and academic) writing generally prefers the active voice over the passive since an active voice has more vitality. That said, a writer may occasionally prefer to use the passive voice. The choice of a passive sentence structure can be for reasons of politics or tact—when identifying the agent would cause problems—or for the reason of desiring to highlight the idea rather than the person behind. In the examples above, the writer may wish to avoid placing the blame on the manager, and so may choose to use the passive voice.

| **LANGUAGE NOTE** | You may have noticed that many sentences in this discussion use the passive structure. Why was the passive structure the better choice here? |

SECTION 6: BIAS-FREE LANGUAGE

Here is a solid rule to follow when working with categories of race, gender, sexuality, disability, or nationality: **Do not specify unless necessary; if necessary, be as specific as possible**.

This rule means that writers should not identify a person (or people) based on race, gender, sexuality, disability, or nationality unless such identification provides information essential to the context. If identification is needed, the writer should be as specific as possible—for example, saying "diagnosed with autism" instead of "mentally ill"—and may want to ask the person what term is preferred.

Here are a few other guidelines to consider.

Gender

- Use language that includes both males and females and does not perpetuate stereotypes.

    Example: Specifying "a male nurse" is unnecessary. Simply use "nurse" and then the appropriate pronoun ("he" or "she").

    Example: "The managers and their wives were invited to the reception." The use of "wives" assumes the managers are all men. More inclusive terms would be "spouses" or "partners."

- Avoid using the generic "he." When referring to an individual whose gender is unknown or unspecified, use "he or she" (likewise "him or her" or "his or her") or change the sentence to avoid using the singular.

    Incorrect: *The interviewee should be asked what his strengths and weaknesses are.*
    Correct: *The interviewee should be asked what his or her strengths and weaknesses are.* –OR–
    Interviewees should be asked what their strengths and weaknesses are.

- Be aware of terms that have assigned gender. Either use the correct gender for the purpose or use a more gender-inclusive phrasing.

    Example: *"Alumnus"* and *"alumni"* refer respectively to an individual or group of males.
    "Alumna" and "alumnae" refer to a single or group of females, respectively. When referring to both genders, state "the alumni and alumnae." The term "alums" is acceptable in informal text.

    Example: The term "chair" or "chairperson" is preferred to "chairman."

Race, Ethnicity, and Nationality: General Rules

- American citizens, irrespective of ethnic background, are simply Americans when ancestry is not pertinent. When distinctions are important, do not use a hyphen between the identity marker and "American."

    The large <u>Korean American</u> population drives 40 percent of the local economy, making it the largest contributor of all the ethnic communities in the city.

- Do not capitalize the terms "black" and "white" when referring to racial origin (provided the terms are appropriate to the purpose of the paper).

SECTION 7: PRONOUNS

- Do not use a pronoun unless the reference has no ambiguity.

  Avoid: *I have examined several options and would like to discuss <u>them</u>.*
  Use: *I have examined several options and would like to discuss my recommendations.*

- Eliminate the empty phrases "it is" and "there is" and "there are."

  Avoid: *<u>There is</u> great value to be had in corporate mergers.*
  Use: *Great value can be created in corporate mergers.*

- Do not use the indefinite "you."

  Avoid: *When <u>you</u> hire people like him, <u>you</u> end up regretting it.*
  Use: *Hiring someone with such qualities can often end badly.*

- Avoid writing in the first person, singular (I) and plural (we), in academic writing. The use of first-person pronouns is acceptable in business writing when the referenced noun is obvious, or in more informal contexts.

LEARN MORE	See the resource handout "Avoiding Vague Language" to learn techniques for removing pronouns.

SECTION 8: NUMBERS AND DATES

Numbers

- Spell out *one* to *nine* in most cases. Use figures for 10 or more. If several numbers are used in a sentence or paragraph, use one format consistently (*e.g.*, use figures for all numbers).

- Use figures for ages and units of measurement. For other contexts, follow the rule above.

    5-year-old daughter, 35-year-old son, 6-foot-2 man
    170 pounds, 2 ounces; 45 inches; 5,500 square feet; 3-credit course
    four-year college; two-week program; 20-person team; 10-month sabbatical

- Use figures for reunions, anniversaries, etc.

    5th reunion; 12th Annual Gala

- When pluralizing numbers, either add 's' or write out the word. Do not use an apostrophe. Spell out decades, or use a four-digit format. Whichever form is chosen, use that form consistently throughout the document.

    seventies –OR– *1970s*
    temperatures in the 60s –OR– *temperatures in the sixties*

- Do not begin a sentence with a figure; if unavoidable, spell the number out. Ideally, rewrite the sentence so the number is not at the beginning of the sentence.

    Avoid: *60 percent of the Class of 2015 received financial aid.*
    Use: *Of the Class of 2015, 60 percent received financial aid.* –OR– *Sixty percent of the Class of 2015 received financial aid.*

- Write out the word "percent." (Writing out the word is the industry standard, but use of the percentage mark (%) is acceptable; choose a format and use consistently.)

    95 percent increase

- Use a comma in numbers with four or more figures.

    3,090 and *96,283*

- Use parentheses and dashes to separate digits in phone and fax numbers.

    (650) 723-3152

- Use numerals when writing decimals. For figures less than one, include the zero to the left of the decimal point.

    0.92 milliliters, average of 1.493, 75.6 percent

- Express fractions with numerals if large or complex. Short fractions (one word for each side of the fraction) can be written with words.

35/78, 265/365
one-half, five-sixths

- Use 1 million, but 999,000.

- Use "8.25 million" instead of "8 1/4 million."

- Use "$1 million" instead of "one million dollars."

- Use less when describing an amount and "fewer" when describing a number.

    less than 70 percent
    fewer than 100 cars

Dates

- Write out the months. In informal contexts, the months may be abbreviated.

    The meeting will take place Tuesday, March 12.
    The annual meeting will take place on the first Monday of July.
    Alexa and I look forward to having lunch with you on Aug. 19.

- Use the 'th' suffix only when referring to the day of the date, without the month. In most contexts, use the month along with the date to avoid ambiguity.

    The minutes for the January 3 meeting will be available on the 5th.
    I look forward to meeting you on the 25th.

- Use commas when including the year with both the day and month. No comma is necessary when using just the month and year.

    The company plans to go public on May 16, 2013.
    The IMF reported on April 5, 2012, that banks would shrink and curb lending.
    The November 2011 report was disheartening.

SECTION 9: ABBREVIATIONS AND ACRONYMS

Abbreviations and acronyms save space by removing long strings of words and, in doing so, assist readers' comprehension, especially when dealing with difficult terms or unwieldy titles. Acceptable abbreviations and acronyms

- must be more recognizable than the full word or term (*e.g.,* DNA, VCR, or etc.),

- must be known to be familiar to the intended audience (*e.g.*, CIA would be recognized by an American audience but may not be known by an international client),

- or must be introduced to the reader.

To introduce an acronym or abbreviation, use the full-length term or title, followed by the acronym or abbreviation in parentheses. When in doubt, write out the term.

> *Price Waterhouse Cooper (PWC) is a multibillion-dollar investment company.*

Acronyms

- Acronyms (also known as initializations) use the initial letters of the main words in a title. **Acronyms do not use periods.**

- Common acronyms include company names, government agencies, technical terms, and titles and degrees.

Abbreviations

- Abbreviations are shortened forms of words and thus use upper- and lowercase letters and periods at the end.

- Some abbreviations, such as certain Latin phrases (for example, *e.g.* and p.m.) have periods between the letters.

- Avoid ending a sentence with an abbreviation as this may cause confusion over whether the period ends the abbreviation or the sentence.

Examples of Acronyms	Examples of Abbreviations
CEO	Dr.
R&D	Jr.
AARP	Inc.
CVS	etc.
USA	Fla.
DNA	a.m.*
MBA	U.N.*
PhD*	Assoc.
FL	sq. ft.
*Degrees such as PhD, MA, MSc, etc. are treated as acronyms and do not take periods. *The abbreviations a.m. and p.m. should be used with periods when appearing in a line of text. In other contexts, such as on a sign or in a diagram, they are used without the periods. *The acronyms U.N., U.S., and U.K. are unusual for using periods. Note that USA does not.	

States

- When referring just to the state, spell out the state.

    North Carolina hopes to curb student debt at state universities.

- When also providing the name of a city or other designation, use the standard state abbreviation with an ending period. The state can be enclosed in parentheses or offset by commas.

    An expansion in Roane County, <u>Tenn.,</u> is part of Volkswagon's growth strategy.
    Congdon and Carl Daikeler co-founded the Santa Monica (<u>Calif.</u>) company in 1998.
    The Speaker of the House at the time was Nancy Pelosi (D-<u>Calif.</u>).

- When writing a full address, use the postal code acronym for the state.

    PO Box 38912
    Richmond, VA 23219

A full list of state abbreviations and postal codes is available in Appendix C.

SECTION 10: CAPITALIZATION

Capitalize titles and proper nouns, *i.e.* names or words used in a formal or specific sense. Words used in a general or common sense should not be capitalized.

> Incorrect: *The Coach training workshop would provide a Foundation to build the Fitness Program for the Teen Program.*
> Correct: *The coach training workshop would provide a foundation to build the fitness program for the Teen Program.*

In the example above, the terms "coach training workshop," "foundation," and "fitness program" are not the actual names of the items but rather descriptions, and should therefore be lowercase. In contrast, the Teen Program is a specific program that the author refers to, and can therefore be capitalized.

Capitalized words should have a different meaning than their lowercase counterparts. Use capital letters to indicate a specific use of a term. Additionally, if a company or business capitalizes certain terms, follow suit.

> *platonic friends*   *the speaker*
> *Platonic friends*   *the Speaker*

WRITING TIP	**To emphasize** a word or phrase, use bold or italic font instead of capitalization.

Capitalize

- A specific person's or entity's formal title.

    President Thomas Jefferson signed the Louisiana Purchase.
    The Department of Economics hosted a farewell dinner for the retiring professor.
    The House Committee on Ethics has ten members.
    The Center for Applied Wealth is looking for a grant-writer.
    The University of Arizona has a new dean of the law school.
    The Federal Reserve has 12 districts.

- Formal names of degrees.

    Master of Business Administration, Master of Science in Management

- Specific regions or well-known areas.

    East Coast, Midwest, Middle East, Upper East Side, Silicon Valley

- The words *appendix, chapter, table, section, figure*, etc. when combined with a number or letter in text.

    The data used in Figure 3 is provided in Appendix D.

- The following in titles and headings in publications:

  - all nouns, verbs, adjectives, adverbs, and pronouns
  - first and last words, regardless of the part of speech
  - subordinating conjunctions: if, because, as, that, etc.

    Global Times
    7 Habits of Highly Effective People
    The Five Dysfunctions of a Team
    Built to Last: Successful Habits of Visionary Companies

- The second word in a hyphenated compound word if the first word is also capitalized.

  Please read the article "E-Mail is Your Worst Friend."
  The headline from 1924 read "Ma Ferguson Wins Run-Off Election."

Do not capitalize

- Terms used in a generic sense to describe a person or entity, even if that term is part of the person's or entity's full title. (One exception is if leaving the term as lowercase will cause confusion with another meaning of the term. See the use of "Cabinet" in the first example.)

  The newly elected president of the United States must choose Cabinet members.
  We should ask the ethics committee to look into this issue.
  The community center hopes to raise a new building next fall.
  The university has an honor code policy on skipping class.
  The federal income tax rate may remain the same this year.

- The first word after a colon or semicolon. The exception is if the phrase following a **colon** (not semicolon) is a full sentence.

  The new initiative will require software upgrades; without these upgrades, productivity will not be at levels high enough to make a profit.
  The company continues to do what it has always done: make good widgets.
  Parker's mentor gave him shrewd advice: Focus on how the end-user customers perceive the impact of your innovation.

- A short quoted phrase (not a full sentence).

  The accounting firm wrote that they are "more than capable" of meeting our needs.

- The following in titles and headings in publications (unless the first or last word of a title):

  - articles (*e.g.*, a, an, the)
  - conjunctions or prepositions fewer than four letters (*e.g.*, but, and, to, on, in, for)

    20,000 Leagues Under the Sea
    How to Win Friends and Influence People
    You're Broke Because You Want to Be: How to Stop Getting By and Start Getting Ahead

- Degrees (used in general sense).

  bachelor's, doctorate, master's

- Directions.

    head east on I-75

- The words *appendix, chapter, table, section, figure*, etc. when appearing in text without a number or letter to specify.

    When drafting the report, please use appendices to include any data used in charts or graphs in the document.

- The article "the" in newspaper or magazine titles or in company names. For newspaper and magazine titles, "the" should not be italicized.

    The VP reads the New York Times *and the* Wall Street Journal *each day.*

SECTION 11: ALPHABETIZATION

Follow these rules when placing items in alphabetical order.

- Omit articles (a, an, the) from company names or publication titles.

- Initials precede full names.

    B. Krupp
    Benjamin Krupp

- Prefixes are part of the name regardless of spacing or capitalization. Treat "St." as "Saint."

    Alcazar
    Al-Mujeddin
    Andrews
    Dennis
    D'Entremont
    MacGregor
    McFarlane
    St. Germaine
    Sinclair

- Articles in non-English names remain as part of the name and should be used for alphabetization.

    El Paso
    Ellicott City
    Laredo
    Las Vegas
    Los Angeles

SECTION 12: PUNCTUATION

Apostrophe (')

Apostrophes are used for two primary purposes: 1) To form the possessive, 2) To indicate omitted letters.

- To form the **possessive**, add ['s] to a singular noun, and just the apostrophe to the plural. Use only an apostrophe for singular proper names or nouns ending in "s"— *e.g.,* Achilles' heel.

    The company's agreement with the prospective client has been voided.
    The companies' agreement to split the cost of the merger has proved difficult to uphold.

- To mark a gap where a letter or letters have been omitted, such as with a contraction. (Note: Contractions should <u>not</u> be used in formal business writing.)

    Our team can't keep up with the rush of orders we've received.

Apostrophes should *not* be used to form the plural (rare exceptions apply) or as an accent mark.

    Incorrect: *The cafe' employees were told to "mind their ps and qs."*
    Correct: *The café employees were told to "mind their p's and q's."*

Appropriate Use of Apostrophe	Constructions that Do <u>Not</u> Use the Apostrophe
Timmann's office	1980s
the campaign's end	MBAs
the generals' agreement	café

Colon (:)

Colons introduce information or a quote. The word following the colon is not capitalized unless a quote or a proper noun.

    Three companies merged to form MegaCo: SunWare, Kieser Energy, and Marx Brothers.
    Investors should examine these elements in a company's financial statement: earnings and
        revenue growth, cash flow trends, and debt load.
    Accountants need stories, too, argues Nancy Duarte: "Even if you're a middle manager…."

- Do not use a colon immediately after a verb unless the verb introduces a quote or marks the natural end to a sentence. A basic rule of thumb is not to use a colon after a verb unless a period could equally go there.

    Incorrect: *The five main points of the presentation were: know the competitor; listen to the…*
    Correct: *The presentation covered five main points: know the competitor, listen to the…*

Incorrect: *The secret is: Jeremy Lin will be the next spokesman for Nike.*
Correct: *The secret has been divulged: Jeremy Lin will be the next spokesman for Nike.*

- Colons frequently introduce a list. Sometimes the items in a list are numbered or bulleted. Regardless of how the list is presented, separate the items with commas (for shorter items) or semicolons (for longer or more complicated items) and include a conjunction (*and*, *or*) before the last item. The following example is a bulleted list, but the punctuation would remain the same even if the list were presented as running text. Note the use of "and" after the sixth item.

  In his acclaimed book, Stephen Covey laid out seven habits of "highly effective people":
    o *Be proactive;*
    o *Begin with an end in mind;*
    o *Put first things first;*
    o *Think win/win;*
    o *Seek first to understand, then to be understood;*
    o *Synergize; and*
    o *Sharpen the saw.*

Comma (,)

A comma is used to mark a pause, insertion, or transition in a sentence. Used wisely, the comma separates text into discrete pieces that the reader can easily understand.

Use commas to do the following:

- Separate two full sentences that are joined by *and*, *but*, *or*, *yet*, etc. Other linking words (*e.g.*, *thus*, *as a result*) require a semicolon in between the sentences.

  The supplier has fewer than 50 employees, yet 80 percent of its customers are corporate giants.
  The New Yorker *and* Wired *recently pulled out of partnerships, but Twitter has not.*

- Separate a series of three or more items. Note the comma before "and."

  The financial manager invested the money in gold, copper, and silver.

- Insert information such as titles, degrees, states, dates, and other descriptive information.

  Jessica Newton, PhD and well-known therapist, will lead the workshop.
  The workshop will be held Monday, March 25, 2013, in the conference room.
  She presents the topic, one excessively covered by the media, in a refreshing light.
  She presents the topic, which has had excessive media coverage, in a refreshing light.

- Set off initial phrases and subordinate clauses.

  Consequently, the budget has been readjusted.
  Unlike her predecessor, the new accounting team manager is comfortable with technology.
  While the CEO was on vacation, the VP swapped office spaces with him.
  Another group of investors has sued, alleging an imbalance of knowledge and money.

- Separating two or more adjectives modifying the same word, if the word "and" could logically be read between the adjectives.

  The faster, more precise software dramatically increased the calculation speed.

Do not use a comma in these contexts:

- Before dependent clauses (phrases that cannot stand on their own) that begin with the coordinating conjunctions *because*, *since*, *when*, *while*, *before*, *after*, *until*, and *if*. If the dependent clause appears in front of the main clause, then use a comma to separate.

    Coal gas is seeing a wave of new investment because of technological advances.
    (Because of technological advances, coal gas is seeing a wave of new investment.)

- Before *that* (restrictive clauses). Unlike sentences using *which* to describe something, which place commas around the descriptive phrase, sentences with *that* do not use commas.

    Local Motors is a new type of car company that crowd-sources the design of its products.

- Before the abbreviations Co., Corp., Inc., and Ltd. and before suffixes such as Jr. or III.

    Empire State Building Co. leases the building from the owners.

Dashes and Hyphens (-)

- **Hyphens:** Use hyphens (-) to join words (or an affix and a word) together into one compound word. See the entry on "Hyphens" below for rules on which compound words take hyphens.

    two + point → two-point conversion
    non + entity → non-entity
    cap and trade → cap-and-trade legislation

- **En dash:** An en dash (–) is longer than a hyphen. Use an en dash to indicate continuing or inclusive page numbers, times or dates, and references**.** No spaces should appear before or after the dash.

    June–August, 1995–1998, May–June 1967, pp. 100–122

- **Em dash:** An em dash (—) is the longest dash. Use an em dash in place of a comma for greater emphasis, or as a stronger alternative to parentheses. No spaces should appear before and after the dash.

    Directly buying such properties—as opposed to investing in shares—makes LogCorp unusual.
    Maclean often speaks of the progress—or lack thereof—of Hu's soft-power offensive.

LANGUAGE NOTE	Imagine replacing the em dashes in the sentences above with commas or parentheses. How would this change the voice and flow of the sentences?

Microsoft Word Tips – Hyphens and Dashes

MS Word has two ways to make hyphens and dashes. The easier method is to use the hyphen key (-). One hyphen makes both the hyphen (-) and the en dash (–). Word can be set to auto-correct the single dash into an en dash in specified contexts. To make the em dash (—), press the hyphen key twice; Word will auto-correct the two dashes into one long em dash. The other method is to select Symbol from the Insert menu and then search for and insert the desired dash.

Ellipsis Points (…)

Ellipsis points are three consecutive dots and are preceded and followed by a space. Do not add spaces between the dots. Ellipses can be used in two ways:

- To indicate material omitted from the middle of a quote.

  Mulally said, "I was new to Ford … I sought advice from everyone."
  "The most disappointing thing was that … my committee wasn't there," said Hart.

- To indicate a faltering or unfinished sentence. **This use should be avoided in business writing**.

  Well, you know what they say ….

Exclamation Point (!)

Avoid exclamation marks altogether in formal business writing.

Hyphens (-)

See the entry "Dashes and Hyphens" above for when to use hyphens and dashes. Hyphens are primarily used to form compound words, *i.e.*, words made from two or more words or affixes. Compound words can either be words of their own right (*co-authored*, *editor-in-chief*) but can also be words combined to modify another word (*value-added media*, *two-year warranty*).

Hyphenate compound words with these characteristics:

- Consist of three or more words.

  pay-per-view, non-name-calling

- Modify another word. (When not modifying another word, these words are not hyphenated.)

  six-point lead, up-to-date information, case-by-case basis

- Are verbs based on compound nouns. (When used as nouns, the compound words are usually not hyphenated.)

  to dog-fight, to speed-date

- Begin with prefixes such as *all*, *self*, *ex*, *half*, or *over*.

  all-important, self-confident, ex-president, wide-ranging, half-truth, over-complicate

- Have repeated or multiple vowels or consonants when conjoined.

  anti-trust, Romney-esque, test-drive

- Consist of an acronym combined with an affix or other word.

  ex-CEO, IM-ed, LTE-compatible

- Connect an adjective with a noun with "ed" at the end. (Do not use the hyphen to connect an adverb with an adjective ending in "-ly"—*e.g.*, "hardly touched meal.")

  big-hearted, *bright-eyed*, *long-winded*

- Form words that could be misread as other words.

  As part of the renovation process, the chairs in the lobby will be re-covered.

Common compound words, such as *smartphone*, *multimillionaire*, *matchmaker*, or *tradeoff*, **do not need to be hyphenated**.

Hyphenated	Non-Hyphenated
so-called	undocumented
desktop-based	underemployed
half-dressed	hyperconnected
Obama-esque	Reaganite
name-calling	baseless
four-year-old	craftsmanship
mid-teens	counterpetition

Italics

Although not strictly punctuation, italics can be used to present information in much the same way that punctuation marks would.

- Use italics for titles of long works, such as books, courses, radio and television series, movies, plays, and periodicals, including online and print. (See the section below, "Quotation Marks," for titles that should be placed in quotes.)

  The Great Gatsby did not see the commercial success of two of Fitzgerald's earlier novels.
  The Advocate, out of Baton Rouge, has attempted to fill the gap left by the *Times Picayune*.
  Recent movies and television shows, such as *Gangsters of New* York and *Boardwalk Empire,* have increased interest in the 1920s.
  Vanity Fair launched an international edition in 1991.

- Do not italicize the initial "the" of the names of periodicals when in running text.

  The profile of the company will be in the *Los Angeles Times* on Friday.

- Use italics for Web and e-mail addresses in running text. When Web and e-mail addresses appear as simple listings (*e.g.*, at the bottom of letterhead), do not use italics.

  > Please e-mail Sarah at *smurray@me.com* for an informational packet.
  > Online: www.sendusmoney.com

- Use italics for foreign terms not commonly used.

  > When doing business in Japan, presenting *omiyage*, small gifts, can help to smooth discussions.

Parentheses () and Brackets []

Parentheses are used to insert additional, but not pertinent, information. In some contexts, writers may prefer to use commas or dashes instead of parentheses.

> *In the wake of Reagan-era deregulation (accelerated under Clinton), the practice got out of hand.*
> *Berlin apartments average about €2,000 ($2,555) per square meter.*
> *Conrad Jenkins advertised the position as "temporary." (Conrad Jenkins is not his real name.)*
> *Underground coal gasification (UCG) was pioneered by Sir William Siemens in the 1860s.*

Brackets, less commonly used, function primarily to include editorial interpretations within a quotation:

> *"Nothing suggests [a] reduced or revised threshold for qualifying funds," Buck says in an e-mail.*
> *"I have to maybe give Peter [Malkin] credit for at least trying," says Lawrence Longua.*

For both parentheses and brackets:

- If the parenthetical information is not an independent sentence (but part of the larger sentence), place the punctuation outside the parentheses or bracket.

  > *While the components of information security,* i.e.*, requirements of definition, strategy and policies, technology, processes, and people (including system and data custodians), are common to all organizations, no two implementations are identical.*

- If the parenthetical material is an independent sentence, place the period inside the closing parenthesis or bracket.

  > *Corporate officers have a difficult time finding meaningful metrics for evaluating efficiency. (Several business journals have presented possible models.)*

- Within quotations, use commas or dashes or dashes to set off parenthetical information, not parentheses.

  > *"My alma mater, Loyola University New Orleans, donated money to my charity," she said.*

Quotation Marks (" ")

Double quotation marks (" ") are the more common style and are used for several purposes, outlined below. Single quotation marks (' ') serve only to mark a quote within a quote.

- To indicate direct quotes. Use single quotation marks to enclose quoted material within a quote.

  > *"The consultant is saying, 'Look at what your plan was,'" says Hintz.*

- To identify titles of shorter works, such as articles, conferences, episodes, essays, poems, short stories, songs, or programs in a radio or television series. (See the section above, "Italics," for titles that should be italicized.)

    One early cover story ("The Casino Society") led the way.

- To mark borrowed words or phrases.

    Many investors regard their stake as an "heirloom" to be passed down to the next generation.

- To include informal words or phrases in formal writing. Avoid using informal language of this sort in formal business writing.

    The company picnic will be held "rain or shine" at the pavilion in Werner Park.

Punctuation with quotation marks: Smaller punctuation, such as commas and periods, goes inside quotation marks. Larger punctuation, such as exclamation points, question marks, dashes, colons, and semicolons, usually goes outside quotation marks unless part of the quoted statement.

Semicolon (;)

The semicolon can be considered a super-comma. Semicolons are used in the following ways:

- To separate two full sentences that are closely linked.

    Rarely is the movie more enjoyable than the book; The Princess Bride *is one of those exceptions.*

- To separate items in longer or complicated lists, especially if items within the list contain commas.

    The company has offices in Gainesville, Fla.; Mobile, Ala.; and New Orleans, La.

- To precede words such as *therefore* or *however* when joining two full sentences.

    The financial department announced a budget shortfall; therefore all teams must revise operating budgets to reflect the new situation.

Slash (/)

The slash is used to separate two elements that are considered alternatives for each other. Avoid use of the slash in full text. Instead, use *or*, *and*, or a hyphen. The slash may be used in certain situations, such as on a diagram or for units of measurement (*e.g.*, 60 ft./sec.).

    Avoid: *he/she*
    Use: *he or she*

    Avoid: *pros/cons*
    Use: *pros and cons* –OR– *pros-cons*

CHAPTER TWO
MECHANICAL AND FORMATTING ISSUES

This section discusses instructions for several mechanical and formatting issues. **General guidelines are presented, but students should defer to professors' specifications when given.**

SPACING

Between sentences (after the period), use a single space. One space should also follow a colon and semicolon.

Spacing between lines can vary depending on a professor's preference and the type of paper. As a general rule, business or workplace-oriented papers (such as memos, proposals, or executive summaries) are single-spaced while more academic-style papers (such as research projects) should be double-spaced to leave room for comments. When in doubt, check with the professor.

Headings and sub-headings must be separated from text by double space before and after. Headings or titles containing more than one line of text must be single-spaced. A double space must also precede and follow a visual support (graph, picture, etc.) placed within the text. Avoid superfluous space between sections or between graphics and text.

Avoid orphans (a single line of a paragraph at the bottom of a page) and widows (a single line of text at the top of a page). At least two lines of text must remain together when going to the following page. The exception is an unavoidable situation (*e.g.,* a paragraph containing three lines). Most word processing programs can automatically manage orphans and widows. Turn on this feature.

Microsoft Word Tips – Widows and Orphans

To turn on the feature that prevents widows and orphans, click on the small arrow on the bottom right of the Paragraph menu to open the Paragraph dialog box. Select the tab "Line and Page Breaks" at the top of the box. The first option will then be "Widow/Orphan control." Make sure the box is checked.

INDENTION AND JUSTIFICATION

Two ways to indent paragraphs are possible. The first is to indent each paragraph (the standard is ½ inch). No extra spaces (*i.e.*, double spacing) should appear between paragraphs. The other option, used in this guide, is not to indent the paragraphs and use a double space between paragraphs to indicate where one paragraph ends and the next begins.

Use left justification throughout the main body of the document.

MARGINS AND PAPER SIZE

Use one-inch margins, *i.e.*, one inch at the top, bottom, and left and right sides. All text must be printed inside this one-inch margin. The page number should fall outside the one-inch margin.

Use 8.5" x 11" paper, unless instructed otherwise.

FONTS

Select and use just one font. Times New Roman is the easiest font to read and is preferred. Typewriter fonts such as `Courier` or novelty fonts such as Curlz MT are difficult to read and should not be used.

Fonts for normal (body) text should be 12 point. Larger or smaller font sizes will not be acceptable. Except for first- and second-level headings, the font color should always be black.

HEADINGS AND GRAPHIC HIGHLIGHTING

Business writing, as opposed to academic writing, relies on graphic highlighting. Graphic highlighting—the use of headings and subheadings to separate and label text—allows the rushed business reader to grasp the content of the document quickly. Students are encouraged to use formatting to highlight key sections of a document.

Headings and subheadings should be distinguished from the main body text through the use of boldface, italics, color, font size, or a combination thereof. Keep in mind the hierarchy of headings: main headings should stand out more than subheadings, which should stand out from normal text. Do not have too elaborate graphic highlighting; the goal is to help the reader read more quickly, not to distract.

Make sure that heading styles are used consistently throughout the document.

Microsoft Word Tips - Styles

Microsoft Word has a feature called "Styles," located on the Home menu. You can set your font preferences for body text and for headings. This feature allows you to do graphic highlighting quickly and consistently. An added benefit is that text is marked as headings, which makes using the Table of Contents tool very easy.

PAGINATION

Not all assignments will require page numbers. Use page numbers on longer assignments, such as reports, proposals, and research projects. Longer assignments frequently have specific pagination requirements for different sections. Pagination of these documents will be covered in more detail in the documents' descriptions in the following chapter (Chapter Three, "Styles for Common Formats").

Professors may also specify a style of pagination. Page numbers must be outside the body of the text, located within the header or footer.

Microsoft Word Tips - Pagination

If a document requires different pagination styles on different pages, MS Word has several options within the Header and Footer menu.

Sometimes the page number for the first page must be in a different position than subsequent pages. Double-click on the header or footer of a page to open these areas for editing. Under the Design tab for Headers and Footers, check the box next to "Different First Page." Then position page numbers as needed.

If a document has a variety of pagination styles (such as a formal report), use section breaks to make changing styles easier. After placing the cursor at the end of the text where the break will be, select "Breaks" under the Page Layout tab and choose an appropriate **section break**. (Next Page and Continuous are the best options.) Once a section break has been added, the pagination style can be changed. Be sure that the option "Link to Previous" under the Header and Footer tools has been **deselected** so that changes made on one page do not carry forward to subsequent pages.

FOOTNOTES AND ENDNOTES

For citations of quoted material, the Loyola MBA standard is APA format, which uses parentheses in the text to provide the references. (More information on references and APA format can be found in Chapter Five, "References.")

The use of footnotes and endnotes to include further information is usually avoided in business writing. If such information is deemed necessary, question whether the information should be included in the main text instead.

Endnotes and footnotes may be more accepted for academic-style assignments. If notes are to be used in business publications, endnotes are preferred to footnotes. A superscript number should be placed in the text at the point where the endnote is referenced. A separate page entitled "Endnotes" follows the last page of text with the notes appropriately numbered.

BINDING

In general, the preferred method of binding is with a carefully placed staple in the upper left-hand corner. If the paper is too thick to staple, the document may be bound with a large paper clip or other metal clasp. Fancy packaging will not improve a student's grade. Some professors will require professional binding for a semester-long or final project.

VISUAL MATERIAL

Where appropriate, tables, charts, graphs, pictures, and other visual material should be used to summarize or clarify the text. Often visual representations can greatly clarify many pages of text. Many business executives strongly recommend students become familiar with the process of developing such visual supports.

Visual aids should be clearly labeled with a centered title containing the **number** of the exhibit (in the sequence of visual aids) and the subject. For example, the second table in a report could be labeled "Table 2: A Statistical Summary of the Population of Orlando." Refer to visual aids in the text by the number (*e.g.*, Table 2) rather than the description.

If possible, visual aids should be placed near corresponding text so the reader does not have to turn the page. A visual aid taking up less than one-fourth of a page should be placed in the body of the paper. If too large, then the visual aid should be placed in an appendix, centered on the page from top to bottom.

Always explain what a visual aid represents and the significance of the material in relation to the text. Do not assume the reader will automatically understand.

CHAPTER THREE
THE WRITTEN NARRATIVE: STYLES FOR COMMON FORMATS

This chapter presents an understanding of a written narrative and examines documents commonly assigned in the MBA program, with descriptions of the documents, the information included, the goals, and the formats.

The formats and styles outlined here are considered the standard for the program and reflect the styles common to the business world; nevertheless, professors or workplaces may differ in the desired details. Always refer to a syllabus, assignment instructions, or workplace templates.

STRUCTURE OF THE WRITTEN WORK

Regardless of the type of document, business writing focuses on selling a point. (For comparison, academic writing also looks to sell a point, but does so more through discussion and elaboration of arguments and information.) To some extent, business writing tells a story, presenting a compelling case for something. Business writing also looks to **apply information** rather than discuss information.

A common weakness in students' presentation of the narrative is the lack of structure. A solid structure ensures both that the text is compelling and that the reader can easily find information. The narrative should be developed in a logical, systematic fashion as a person would develop a persuasive argument. The next two sections explore two important aspects of writing logically: the main idea and framing.

Main Idea

One of the most important aspects of writing is the main idea. A document needs a main idea—something that the reader should understand or believe after reading. A document itself has a main idea, but so does each section and each paragraph (and each sentence). The business writer should spend time identifying the main idea for the document and the various parts. Keeping the main idea in mind while writing allows the final product to be more cohesive and direct.

Framing

Framing is an effective technique commonly used in business writing. An introductory element and a concluding element outline the main idea. A middle section presents the various points to consider. This structure applies at every level: Every document, every section of a report, and every paragraph should have an introduction that provides context, a middle that develops the idea, and a conclusion that summarizes the main idea and provides a movement forward.

> An old rule for writing:
> "Tell them what you're going to tell them, tell them,
> and tell them what you told them."

Further Considerations

The use of headings and subheadings (graphic highlighting) is encouraged. Headings allow information to be easily located and make the document visually appealing. Be consistent in the format of the headings and subheadings. Designate different levels of information (section, subsection, sub-subsection, etc.) and use the same format for all headings at each level. (See "Headings and Graphic Highlighting" in the previous chapter for more information.)

Be careful to **follow any special instructions from your professor** about the content or structure of the body of the paper. Also, the body of the paper must properly reflect the subject of the class and the subject of the paper. Professors are amazed when a student turns in a paper for a marketing class that contains no marketing content.

MEMORANDUM AND E-MAIL

A memorandum (or memo) is a short, informal intraoffice report that discusses observations or events or brings information to the attention of the recipient(s). A memo may take a more conversational tone depending on the subject matter and the recipient.

A memo must identify a sender, a recipient, the date, and the subject. The subject line has the essential function of capturing the reader's attention. The subject should be short and concisely describe the topic.

Today's memoranda are rarely delivered in hard copy but are instead sent via e-mail. While hard copy memos are generally 1-2 pages long and have some formatting, e-mail memos are shorter and use less formatting. Two examples are given in the following pages, one a hard-copy memo, the other an e-mail.

The word "Memorandum" or "Memo" is usually written at the top of the document. A memo is usually single-spaced, but a professor may ask for a memo to be double-spaced. Page numbering is unnecessary, but graphic highlighting is encouraged to make the ideas easy to grasp.

A memo is intended to be brief. Focus only on essential information and direct the recipient(s) to sources of further information. If attachments are included, indicate their inclusion and explain their purpose—and be certain to attach the items.

The general structure of a memo is as follows:

1. Introduce the topic at hand and the context for writing the memo. Brevity is essential since the reader does not want to spend much time understanding the reason for the memo.
2. Touch on key points.
3. Conclude by specifying the action or information desired of the recipient and by providing necessary contact information.

MEMORANDUM

To: Jared Wrage, CFO
From: Justine Tuck
Date: July 12, 2012
Subject: June Monthly Recap—Rocky Mountain Region

The Rocky Mountain Region continues to show growth in new accounts and retail sales. The increase of product back-orders is a problem this month. A plan to reverse the negative trend was initiated.

Store records   Of the nine Rocky Mountain retail stores, seven ranked in the top 10 stores for retail sales. Sales for the entire region exceeded those of any other area.

New accounts   The region acquired six new suppliers in anticipation for winter sales items.

Reasons for the increase The region did not properly prepare to meet the demand for summer sales
in back orders   items. The demand grew considerably from 2011 to 2012.

The attached action plan outlines what the region has done and will do to reverse the trends and mend any troubled relationships. Please contact me at extension 8487 with any further questions.

From: sholtz@hn.com
To: jwayne@hn.com
Date: Tue., Jan. 21, 2013
Subject: Branch communication training plan

John,

As you know, the company re-organization has forced all employees to take on new roles and responsibilities. Since dedicated project managers are no longer a part of our business model, communication with customers by our front-line personnel has become critical. Recent customer survey data suggests that we have not yet met this challenge, and customers are finding it increasingly difficult to conduct business with HN. In addition, lack of communication with customers is having a direct negative financial impact on our business.

Because of these reasons, I believe that our front-line personnel need communications training. Effective customer communication seems an unreasonable expectation if our front-line personnel have never had any training. A communications workshop can be conducted in half a business day for approximately $5K. If I can have ten minutes of your time, I can easily show you how the business can recoup this investment. Please let me know when you are available, and I look forward to helping drive the team in a forward direction.

Thanks,

Sam

EXECUTIVE SUMMARY

Most business managers are seldom willing to read a lengthy report and only want very specific information. The executive summary is a section of a report that a busy executive can quickly read to determine the essence of the document. The summary must succinctly describe the purpose of the report and all major topics addressed, including recommendations. If the summary triggers an interest, then the executive can continue to read and determine where in the document to look for the information desired. Occasionally an executive summary will be requested without the rest of the report.

To help the executive reader immediately grasp the scope of the report, the executive summary should include only the most essential information: the reason for the report; any time frames, dates, and costs; execution steps; recommendations; and the expected result. Numbers are essential—*e.g.,* "the presented plan saves the firm $4 million per year," or "the process improvements will cut the firm's hiring time by 50 percent."

The executive summary is normally no more than one page in length and is <u>not</u> a one-paragraph abstract. Graphic highlighting should be used to label the overview (introduction) and recommendations (conclusion) as well as the information points. Single-space the executive summary (unless otherwise indicated).

The executive summary appears in the front pages of a report. (See the description under "Reports" for the exact placement of the summary.) The summary is numbered as page "ii," "iii," or "iv" depending on whether lists of tables and figures are included. Where page constraints are placed on the report, the executive summary does not count as a page.

Executive Summary
Merging Benefits at Huge Computer Company

Background:

Two major high-tech companies, Huge Co. (HC) and Computer Co. (CC), have merged recently to form Huge Computer Company (HCC). One of the key challenges in the integration process is how to blend the software engineers' benefit and retirement plans. The chief of operations at HCC has hired our consulting firm to assess the plans of both companies and to make recommendations about merging the plans.

On February 17, two teams from our company interviewed Human Resources administrators from the two companies. The interviews examined a) the strengths and weaknesses of each benefit plan, b) how well the current plans meet employee needs, and c) the key areas of concern for employees as the plans are merged.

Key Findings:

The table below compares the workforces and the benefit plans at the two companies:

	Huge Co. (HC)	Computer Co. (CC)
Employee base	22,000, in late 30s-40s Focused on health benefits and retirement programs	8,000, young Focused more on perks such as vacation packages and fitness center
Work culture	Formal	Rewards creativity and independence
Reputation	Good employee retention	National recognition for flexible hours and benefit options
Benefit plans and retirement options		
Strengths	Two choices for medical plans Flexible spending account Good retirement program	Flexible plan with cafeteria option
Weaknesses	No short-term perks	No long-term saving options No focus on retirement
Cost per employee	$20,000	$26,000

Recommendations:

For the merger to be a win-win undertaking, we recommend the following:

Content:
1. Feature CC's **flexible cafeteria option** and HC's **spending account** into the new plan. These two options will give each employee the opportunity to choose and design a benefit package based on desired components. **Flexible hours** at CC is an added element that should be kept.
2. Include a **strong retirement program**. This long-term saving option is an asset at HC and will improve CC's current plan.
3. Pursue **price negotiation** with benefit providers to take advantage of economies of scale. Based on this analysis, the new company could save up to $70 million a year.

Process:
1. Make the integration process as **transparent** to keep employees informed of new developments.
2. **Consult with employee representatives** at key steps of the integration process. The consultation will strengthen employees' ownership of the merged benefit plans and ultimately will reinforce employees' sense of belonging to the new company.
3. Ensure that the HR departments at CC and HC jointly lead the integration process.

Executive Summary
## Determining the Relationship Between CEO Compensation and Company Performance

In response to a request by Chris Moellar, President of Executive Recruiters (ER), Performance Consultants Inc. (PCI) was hired to determine what measures Fortune 500 companies use to establish the compensation of their chief executives. In particular, Ms. Moellar wanted to know if a CEO's compensation correlates directly to the financial performance of the CEO's company.

Analytical Methods
To determine what drives the compensation of top executives, the PCI team selected CEOs from a representative sample of Fortune 500 companies. For these CEOS, we performed statistical analysis to determine whether CEO Compensation is positively correlated to performance. The average compensation of the 100 CEOs in our study was $3.1 million, ranging from a low of $0.5 million to a high of $10 million. In assessing company performance, we used five-year return on investment (ROI) as our primary measure; the companies in our 100-company survey group reported a five-year average ROI ranging from ($0.5) billion to $5 billion.

Performance Impacts Compensation
We found a definite relationship between the five-year ROI of a company and the total compensation that the CEO receives. Based on our analysis, the CEO compensation increases with every 10% increase in a company's ROI level (Exhibit 1). In addition, besides performance, we found only one other factor that significantly influences CEO compensation: age. The older the CEO, the more salary he or she received.

Exhibit 1: CEO Compensation Correlates Directly to Average Five-Year ROI
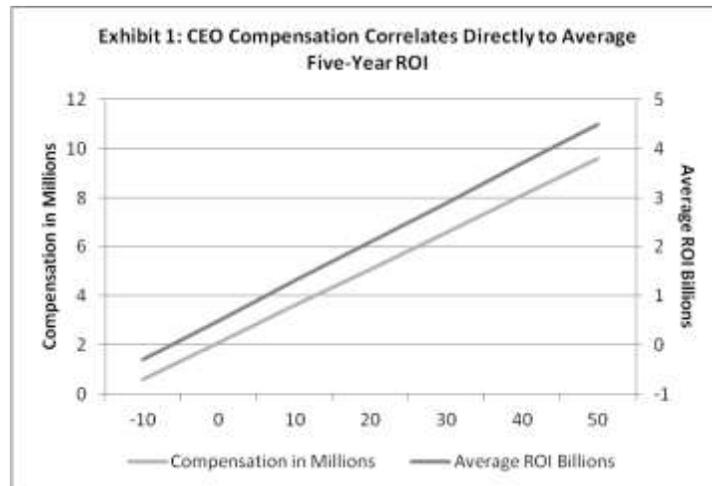
Recommendation
Based on PCI's findings, CEO compensation is directly related to company performance, but other factors, such as CEO age, also have an impact on compensation. Given our results, ER should continue to monitor company performance and use the 10-percent increments as the basis for recommendations to clients on compensation levels and on adjustments.

PERSUASIVE PROPOSAL

Persuasive proposals propose an action and provide supporting evidence to convince the reader that taking that action is desirable. Two of the most common types of proposals are sales proposals and grant and research proposals.

Proposals may be short (2-3 pages) or longer. Longer proposals should be formatted similarly to formal reports (described in the next section), with front matter and back matter in addition to the body of the proposal. A proposal is single-spaced. (If double spacing is required, only the main body of the proposal should be double-spaced.) The use of graphic highlighting is encouraged.

Shorter proposals must be concise and present the most essential information to help the reader make a decision. Longer proposals can use the executive summary as a quick guide and then provide more (but not excessive) detail in the main body of the proposal.

Be specific. Provide details such as numbers, dates, and specific actions to show that all aspects have been considered. **Persuade**. Each piece of information has a significance that should be made evident. Each piece of information needs to support the choice of the recommended action.

WRITING TIP	Writing a brief statement of purpose helps to direct the writing of the proposal. The statement of purpose should include the problem or opportunity being addressed and how the proposed action will solve or take advantage of the situation.

A proposal will usually contain the following components:

1. **Introduction**: A persuasive hook (for example, identification of a beneficial opportunity or a serious issue) and the proposed action.
2. **Background**: What problem exists, or what opportunity is available.
3. **Plan**: How the problem will be solved, or how the opportunity will be grasped.
4. **Implementation**: How the proposed action will be implemented.
5. **Timetable or Schedule**: What will be done and when.
6. **Evaluation**: How the plan will be evaluated.
7. **Budget**: How much the plan will cost.
8. **Benefits**: What positive outcomes are predicted to follow.
9. **Recommendation or Conclusion**: Reiteration of the recommendation and summary of the positive attributes and results of the proposed action.

Depending on the nature of the proposal, additional aspects may need to be addressed, such as staffing, persons involved or affected, or crucial resources or equipment.

Consideration of the reader is important in the persuasive proposal. The choice of tone, evidence presented, amount of technical terms used, and so forth, can vary depending on the intended audience.

Use the first person when stating the proposed action, *e.g.*, I (We) propose that …

Federal Grants Management Workshop Proposal

Federal Grants Management Workshop for the Wilderness Society
Since November 2011, The Wilderness Society (TWS) has allowed staff to apply for federal grants and has raised over $400,000 in one year. The organization has the potential to increase this revenue stream, but staff members lack proper training to handle these types of funds. I strongly recommend that TWS invest in a federal grants management workshop.

Challenges in Managing Federal Grants
TWS has one staff in the Finance Department who has experience managing federal grants. The Foundations Department, which is responsible for handling pre- and post-award grant activities, only has experience handling private grants. This lack of knowledgeable personnel causes delays in applications, submission of subpar proposals, inconsistencies in bookkeeping practices, and frustration among staff. This situation translates into missed opportunities and loss in revenue.

By March 2013, the organization will have $500,000 in federal assistance. Meeting this threshold will trigger the extensive and onerous OMB A-133 federal audit. Given the current state of how the federal grants are managed, passing this audit will be challenging.

Workshop Set-Up
I propose that all three Foundations staff take the "Managing Federal Grants and Cooperative Agreement for Recipients" workshop. Management Concepts, the leading management and technical skills company for the federal government, facilitates this course. The course is designed for personnel of recipient organizations who are responsible for grant project administration and for developing and implementing institutional policies. Students develop the following working knowledge of issues that affect day-to-day operations and management of federal grants:

- Determine applicable statutory and regulatory authorities and discuss the authorities' impact on grants administration;
- Examine valuation of cost-sharing contributions;
- Discuss new government-wide financial and progress reporting forms;
- Evaluate proposed changes in budget and scope to determine whether prior approval by the awarding agency is required;
- Explore how agencies and auditors review internal controls through site visits; and
- Apply knowledge gained in the course in a simulated negotiation with agency personnel over grant terms and conditions.

Budget
The total cost of the workshop for three Foundations staff is $2,700 ($900 per person). A grant from the Aspenwood Foundation designated for staff professional development can cover this expense.

Time and Location
The workshop is in the Nature Conservancy building at 1600 M Street, Washington, D.C. This location is a block away from the headquarters of the Wilderness Society. The three-day course starts on January 9, 2013, from 9 a.m. to 4 p.m. Most of the organization's fundraising activities are completed in December, which makes January an ideal month for Foundations staff to be away from the office.

Benefits to the Organization
After attending this workshop, the Foundations staff will possess the knowledge to establish policies and processes for managing federal grants that are in compliance with government regulations. This effort will guarantee that the organization passes the OMB A-133 federal audit, which TWS needs to pass to continue receiving federal assistance. The Foundations staff will also have a better understanding of application requirements and can provide valuable advice to the applicants. The organization can expect improvements in the quality of federal grants applications and the timeliness of application submission. All these results will increase revenue for the Wilderness Society.

Conclusion of Recommendation
Staff members properly trained in federal grants management are essential in maintaining the good financial health of the organization. These employees can help improve the quality of grant applications, ensure that these grants are managed properly in accordance with government regulations and, most importantly, increase revenue for the organization. The cost of the federal grants management training is affordable, and the location and date are convenient for the participants. I strongly suggest that the Wilderness Society invest in federal grants management training for Foundations staff.

REPORTS

The report described here is a formal report. (Other styles of reports include progress, investigative, feasibility, and data analysis reports; these styles will not be covered here.) Formal reports generally present the results or an account of a large project and often include substantial research. In the workplace, reports may be written by an individual or a team.

Reports are divided into three parts: front matter, main text, and back matter. These sections include various elements and should follow the sequence below. The elements in **boldface** must be included in all reports.

1. Front Matter (Use Roman numerals for pages: i, ii, iii, ...)
   a. **Cover Page**
   b. **Table of Contents**
   c. List of Tables
   d. List of Figures
   e. **Executive Summary**
2. Main Text (Use Arabic numerals for pages: 1, 2, 3, ...)
   a. **Introduction**
   b. **Body of Paper** (Do not use this label as a heading.)
   c. **Conclusion**
3. Back Matter (Continue with Arabic numerals.)
   a. Footnotes and Endnotes
   b. **References**
   c. Appendix or Appendices

Front Matter: The front matter provides an overview of the information in the report and shows where key information is located.

> **Cover page:** On the cover page appears the title of the report, the name(s) of the author(s), the organizational logo, the name(s) and organization of the addressee(s), and the date. At the very least the cover page should look professional (*i.e.*, not center-justified with plain text). Creativity is a bonus.

> **Table of contents:** The table of contents should list every heading and subheading in the paper. Each entry must be followed by a line of periods that ends with the page number for that entry. All page numbers should be flush against the right margin. See the Table of Contents of this guide as an example.

Microsoft Word Tip – Table of Contents

Microsoft Word has a Table of Contents tool. Under the References tab, select "Table of Contents" and choose a preferred style (or format your own). If you have used the Styles menu to format headings and

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subheadings, the Table of Contents tool will automatically create an organized list based on these headings.

If you did not use the Styles menu, first use the dropdown menu "Add Text" (to the right of the Table of Contents tool) to set the levels of your headings. Select a heading and choose the level for the heading (for example, main section headings will be Level 1). Once your headings have been marked, the Table of Contents tool will place them in a table of contents at the correct level.

If preferring not to use the Table of Contents tool, you can type in the various headings and subheadings. After creating the list, use tab stops to create a smooth, flush line of page numbers:

1. Highlight the list of headings and topics in your table of contents.
2. On the Home tab, click the small arrow on the bottom right of the Paragraph menu to open up the Paragraph dialog box.
3. Select the button "Tabs" at bottom left.
4. Select right alignment and the second leader option (a line of periods).
5. In the "Tab Stop Position" box, type 6.5" (or where the edge of the text will be).
6. Click on "Set."

Once you have set your tab stop, go to the end of one line or heading in your table of contents; when you click the "Tab" key, your cursor will move to the rightmost margin, creating a line of dots to where you write the page number.

List of tables and figures: Each figure and table presented should be listed. As with the table of contents, after each entry, a line of periods leads to the page number on the right margin.

Executive summary: Because executives turn to the executive summary first to grasp the full idea of the report, the summary is a crucial element. Details on the executive summary are found in the "executive summary" description on page 37.

Main Text: The main text presents the details and the bulk of the information of the report. An introduction explains the context of the report, the purpose, and the scope. The body presents the details of the investigation of the topic and the steps leading to a solution. Visuals, such as graphs, tables, or pictures, provide further explanation. A conclusion summarizes and interprets the findings. Recommendations, often included in the conclusion, apply the findings and recommend a course of action to be taken. Dividing the main text into sections and subsections and the labeling the sections with concise, descriptive headings are recommended. Refer to Chapter Three for details on the written narrative and Chapter Two for more on visuals and graphic highlighting.

Back Matter: The end of the report contains supplementary material—appendices, glossaries, bibliography, and index—that provides further information or directs the reader to other sources of information.

Footnotes and endnotes: The Loyola MBA program usually discourages the use of footnotes and endnotes in assignments unless required by the professor. If used, follow the guidelines presented in Chapter Two, "Mechanical and Formatting Issues."

References: Providing a reference for a source of information may not be necessary; use source citations if required by a professor or for documents such as reports that may include critical information from other sources. For more information, refer to Chapters Four and Five.

Appendices: Some information or items (copies of important documents, technical notes, graphs, lists, etc.) may be too lengthy to place in the body of the text and should be placed in an appendix. Do not include an appendix that is not also referred to in the text. Appendices should be titled in sequence, beginning with Appendix A. Each page of the appendices is lettered in sequence continuing from the reference page(s).

Reports have a specific pagination style. With the exception of the cover page (which has no page number), the front matter uses Roman numerals (i, ii, iii, iv, ...) centered at the bottom of the page (in the footer). The main text and back matter use Arabic numerals (1, 2, 3, 4, ...). For the main text of the paper, the first page has the page number at bottom center of the page, in the footer. All subsequent pages should be numbered at the top right corner, in the header. The page numbers for back matter should all be placed at the bottom center, in the footer.
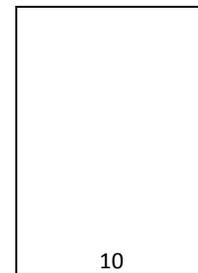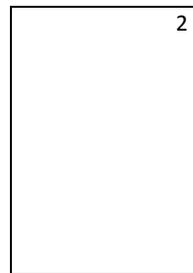
Layout of Page Numbers for Different Sections of a Report

i

1

2

10

Front Matter   Main Text   Back Matter
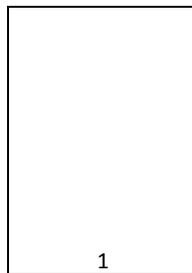
LOYOLA UNIVERSITY NEW ORLEANS | COLLEGE OF BUSINESS
Master of Business Administration

Pemberton's Corporate Publications

March 28, 2013

Prepared for Kim Wilmath
Vice President of Operations
Pemberton Manufacturing

Prepared by Sarah Thompson
Loyola University New Orleans
College of Business

Report example adapted from M. Northey, 2002, *Impact: A guide to business communication* (5th ed.), pp. 208-218, retrieved from www.pearsoned.ca

Table of Contents

List of Figures

Executive Summary

Recent changes at Pemberton and a new strategy for customer service have led to this review of the current corporate publications. In a time of change, effective publications will help Pemberton employees to understand and support the changes. They will also enhance the company's marketing effort and image.

As a result of our assessment, which included discussions with employee groups and major customers, we recommend five changes to the publications program:

1. Institute an electronic newsletter to be e-mailed to employees monthly. It will provide brief, timely information to employees and make feedback between management and employees easier to obtain.
2. Refocus the present print newsletter, *Newsline*, to emphasize discussion of policy issues. Rename it and reduce the number of issues to two a year from the current four.
3. Double the issues of the corporate magazine, *Salute*, to two a year, with the marketing department becoming more involved in planning and getting feedback from customers.
4. Enliven the annual report by increasing the use of visuals, upgrading the binding and cover design, and including comments from employees and customers.
5. Publish a version of the annual report on the Pemberton Web site to increase access to the global marketplace.

The communications group can begin to implement these recommendations immediately, if approved, for an estimated added cost in 2014 of $56,000 over the 2013 budget of $158,000.

Pemberton Publications

Introduction

In its first year under new ownership and management, Pemberton Manufacturing has undergone major changes, including adopting a new strategy for customer service. As part of Pemberton's company-wide review, this report presents our assessment of corporate publications and recommends steps to increase effectiveness in this period of change.

Our assessment included

- Extensive discussions with the communications group.
- Meetings with senior managers in all departments.
- Ten focus groups, each with 15-20 employees. Individuals in the groups were selected to represent the various functions and levels at Pemberton. We chose to use focus groups rather than conduct a survey of all employees, since in the preceding month employees had completed a human resources questionnaire and would likely not have welcomed a second one so soon.
- Ten interviews with Pemberton's major customers.

Assessment of Current Publications

Currently the communications group produces three publications:

1. *Newsline*. Pemberton's internal newsletter, published quarterly, covers a whole spectrum of topics, from employee news to industry matters. Our focus group discussions revealed that most employees read it and find it easy to understand. However, they find the news value is limited. Since it is published every third month, most news items have reached employees through the grapevine before they read them in *Newsline*.

   Our experience with other companies suggests that this type of publication is most useful for discussion of policies, issues, and ideas for which the "news" element is not as important. It is also suited for complex items, such as changes in employee pension plan options. The ability of the communications group to write in simple, clear language is of great benefit in this type of publication.

   The publishing cost for *Newsline* is currently $19,000 per issue.

2. *Salute*. Published annually, this glossy, color magazine for industry customers reviews new products and discusses industry issues. It has a high approval rating and serves a useful marketing as well as general public relations purpose. Customers say that the range of this publication gives Pemberton an edge over competitors. It is expensive—$35,000 to produce and deliver one issue of 3,000 copies—but readers want more than one issue a year.

3. *Pemberton Annual Report*. Produced in two colors, the report performs a financial information function for investors and doubles as the Pemberton corporate brochure for people wanting general information about the company.
   However, the impersonal focus, lack of visuals, and tabular presentation of data are conservative

and leave a somewhat dated impression. The publication does not reflect Pemberton's new emphasis on customer service—on people serving people.

The annual report is relatively inexpensive to produce—$47,000 for 6,000 copies.

Figure 1 shows the percentage of total publication costs currently taken by each publication.

Figure 1   Current Publication Costs
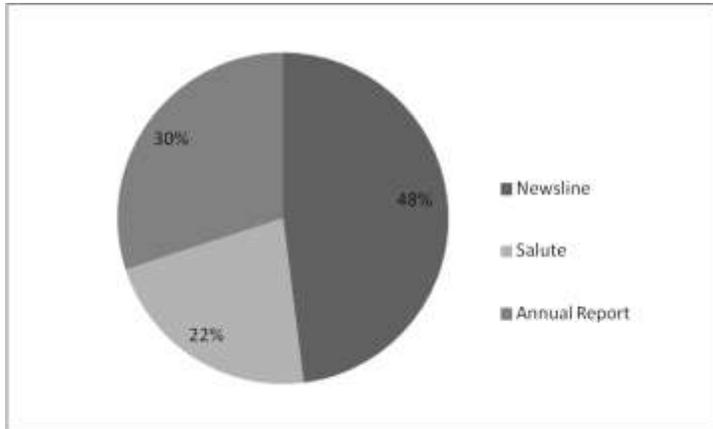
Communication Needs for a Changing Company

Internal Communications
Changes at Pemberton have created an increased need for timely internal communication. The focus groups with employees indicated that at all levels they want to be informed about new policies and planned changes. Without this communication, much productive time will be wasted on speculation and rumor.

As well, employees at all levels need to understand how the new customer service strategy translates into action. If employees are to support the strategy actively, they will need to know that management is responsive to their concerns and ideas. Although much internal communication with employees can and should take place informally through meetings and one-on-one discussions with others, written communications can also help. As a recent infosystems study suggests, strong internal communications have a major impact on employee morale and productivity levels (Edson, 1999).

External Publications

Salute
External corporate publications can reinforce customer and investor perceptions of Pemberton's attention to customer service. Prior to 1998, the *Annual Report* was the single document distributed externally by Pemberton Manufacturing. In July 1998, management published the first edition of a new public relations magazine, *Salute*. The effect on sales was dramatic: an increase of 20 percent in the first six months after publication (see Figure 2).

Figure 2   Effect of *Salute* on Company Sales
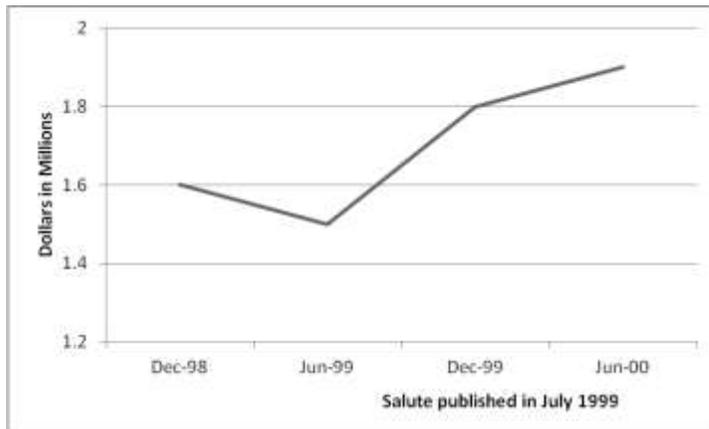
The role of *Salute* in enhancing the profile of Pemberton products in the marketplace is clear; with the company's new marketing effort, the magazine will assume a leadership role in developing new international markets.

Annual Report
Pemberton is acquiring a dominant position in the international marketplace, with the result that the company's annual report must be adapted to suit a new readership. The traditional format requires some updating to keep pace with current marketing trends. In addition, an online format will be a major asset in reaching a global market. Online reporting has resulted in increases of 15-20 percent in international sales (McLean, 1998; Stewart, 1999), an opportunity which Pemberton can capitalize on in the next six months.

Recommendations

1. **Create an electronic newsletter.** New information technologies are making it easier to send information quickly to many people and to have interactive communication. A monthly electronic newsletter would take advantage of Pemberton's highly computerized workplace, where all employees have access to company e-mail.

    An electronic newsletter is useful for brief, timely items, not for lengthy multi-page discussions, which are harder to read online. It can also foster a two-way flow of communication with management. For example, it can ask for quick feedback on plans or respond to employee questions.

    Forty hours of staff time per month should be budgeted for the production of a monthly electronic newsletter, with an approximate annual cost of $15,000.

2. **Refocus *Newsline*.** With the new electronic newsletter, the print newsletter would not have to be produced as often. Two issues a year would likely meet the need for the kind of in-depth discussion of policies and issues that the print version is best suited to.

    The present cost of *Newsline* is $19,000 per issue, or $76,000 per year. We anticipate an increase

of approximately 10 percent in printing costs, which would be offset by the savings realized by printing only two copies a year. This would result in a reduction of costs by approximately $34,000 annually.

3. **Double the number of issues of *Salute*.** Concern for customer preferences as well as for costs suggests an initial experiment of two issues a year instead of one, with a re-evaluation of reader response after one year. Two issues would increase the present annual cost by $35,000.

   Since this publication provides an opportunity to market new products as well as enhance the company's image, the marketing department should be more involved in planning each issue as well as in getting regular feedback from customers.

4. **Reformat the annual report.** Three additions would help to produce a more dynamic, people-focused report, reflective of Pemberton's customer-service strategy:

   - Increased use of visuals, including photographs of plant operations.
   - Interviews with Pemberton employees and customers to illustrate the company's new customer service orientation.
   - Upgrades of binding and cover design for a more professional look.

   These changes would increase the cost of the report by approximately $20,000.

5. **Publish annual report on the Web.** Pemberton's rapidly increasing global market requires the rapid transmission of information and suggests the need for an online report. The company Web site at *www.pemberton.com* is reporting in excess of 1,500 hits per month, and publishing the annual report on the site is an obvious strategy for building global communications.

   Pemberton's information technology staff have the expertise and the technology to do this. The estimated figure for staff time is approximately $20,000.

Conclusion
Overall, the estimated additional cost of implementing this communications action plan is $56,000 for the next year. Figure 3 maps out the current and projected costs for Pemberton's publications.

Figure 3   Cost Analysis

Publication	Current Cost	(-)	(+)	Projected Cost
Newsline: E-mail edition			$15,000	$15,000
Newsline: Print edition	$76,000	($34,000)		$42,000
Salute	$35,000		$35,000	$70,000
Annual Report: Print edition	$47,000		$20,000	$67,000
Annual Report: Online			$20,000	$20,000
TOTALS	**$158,000**	**($34,000)**	**$90,000**	**$214,000**

We have discussed our findings and recommendations with the communications group, who think they could make the changes within six months. Given the expertise of current staff and the state-of-the-art technology at Pemberton, the recommended changes would be unusually inexpensive to implement.

In addition, there would be no disruption to Pemberton's current organizational plan. The communications department could implement these changes with current staff experiencing only minor changes in their current job descriptions. No layoffs or new hires would be required. The stability at Pemberton would continue unimpeded with no negative impact to employees or customers.

If management approves the proposed changes, Pemberton would realize almost immediate gains in productivity and sales at minimal cost.

References

Edson, M. (1999). Internal communications as an HR tool. *Corporate Concerns, 65*, 1190-1195.

McLean, E. (1998). Online business reporting for the millennium. *Business Trends, 49*, 129-143. Retrieved from http://www.businfo.org

Stewart, D. H. (1999). Electronic reporting and global trends. *Corporate World, 73*, 248-279.

CHAPTER FOUR
USING MATERIAL WITH INTEGRITY

Data, ideas, quotes, graphs, and pictures are some of the many types of material that can be borrowed from other sources and incorporated in one's writing. Borrowed material is considered the intellectual property of others and should be respected. Integrity in writing means giving credit to the original source of an item or idea.

Using material with integrity involves two components: knowing when to give credit and knowing how to give credit. This chapter will cover these two areas.

WHEN TO GIVE CREDIT

When is credit due? In academic writing, a reference (in the form of a footnote, endnote, or parenthetical reference) must be provided for every piece of borrowed material. (The exception is material considered "common knowledge," that is, information that is widely accepted in the field.) The emphasis on citations serves several purposes: citations give credit to the original source; the lack of a citation signals the ideas original to the writer; and citations allow other researchers to find more information on a subject.

In business writing, however, less emphasis is placed on citations and referencing. Executives care less about where an idea originated. Referencing and citations serve the purpose, therefore, of acknowledging copyrighted material and of validating data or information (such as numbers or statistics). In the workplace, the use of citations and references will likely be limited. In the MBA program, professors may ask for sources. Even if source information will not be given in the document, keep track of sources of data or other items in case someone asks.

An attempt to pass off someone's exact words or work as one's own is plagiarism. **Plagiarism is a very serious breach of academic integrity and will result in expulsion from the university.**

> As part of a course, professors will share knowledge that students can use as their own. Upon entering the work force, students need not reference a professor's lecture or slide deck when presenting ideas.
>
> Example Situation: *A former student of Dr. Goolsby is presenting insights on improvement of a company's new product development process to a CEO. The student uses a system created by Joseph Juran and Dr. Goolsby's lecture notes and slide deck to help to form recommendations. The student cites Joseph Juran as the creator of the product roadmap system but does not need to credit Dr. Goolsby's lecture and slide decks with the relationship between the house of quality framework and Juran's roadmap. If the CEO inquires about the student's sources for the stated relationship, which is highly unlikely, the student could then provide Dr. Goolsby's notes and slides as evidence.*

HOW TO GIVE CREDIT

Giving credit first entails incorporating borrowed material correctly. The following sections discuss how to incorporate text (by quoting or paraphrasing) and visual material or data. **Paraphrasing is the most common and most effective way to use borrowed material.** Quoting has a more focused application.

Giving credit also includes providing source information. This topic is covered in the following chapter (Chapter Five, "References").

Quotes

Quotes are short pieces from a text (no more than a few lines) that best express the desired idea. A quote does not have to be a full sentence. Always introduce and explain quoted material (rather than inserting material as-is).

Original text: Economic success on its own may no longer be enough, nor may it be a satisfactory measure of success. The society appears to expect more and to demand more of its business sector. (Svensson & Wood, 2008, p. 308)

Quoted: Svensson and Wood (2008, p. 308) argue that a business's profit "may no longer be enough, nor may it be a satisfactory measure of success."

Quoted: The business world would do well to consider that "economic success on its own may no longer be enough" and that society may hold businesses and corporations to ethical standards as well as profit goals (Svensson & Wood, 2008, p. 308).

Quoted: Svensson and Wood suggest, "Economic success on its own may no longer be enough, nor may it be a satisfactory measure of success" (2008, p. 308).

 Notice that for the first two quote examples, only a part of the original sentence was used, but that portion retained its original sense and was properly introduced and incorporated into the writer's larger flow of thought. In the first example, the focus is on the authors (Svensson and Wood); in the second, the focus is on the ideas. In the third example, the full sentence is quoted, with a brief introduction.

Block Quotes

Quoted text longer than four lines should be formatted as a **block quote**. Block quotes do not use quotation marks, and are single spaced and indented one-half inch from both the left and right. A colon introduces the quote, and a space separates the quote from the preceding and subsequent paragraphs.

The role of business ethics is not to be left to the philosophers but should be considered carefully by corporate leaders. Svansson and Wood (2008) predict dire consequences for those companies who do not consider their social responsibilities:

Socially responsible managers are needed to force us to confront new areas of thought, to challenge, to inspire, to mentor, to lead. Some companies are fortunate because these people exist in their midst. Those companies that do not possess, recruit or foster managers with well-developed ideals for social responsibility leave themselves open to potential dilemmas orchestrated on their behalf by a staff whose perspectives may be far from socially responsible. Errant actions may not come to light immediately, but when they do the downside to the corporation can be its own annihilation. (p. 311)

Punctuation with Quotes

The "Quotation Marks" section in Chapter Three, Section 12, covers where punctuation marks should go in relation to quotation marks. Also refer to the examples above.

When omitting text from the middle of a quote, use ellipses (...) to mark the omission:

"The quality of services ... depend[s] not only on how well the service provider performs, but also on how well the consumer performs" (Zeithaml 1981, p. 187).

Paraphrasing

Paraphrasing is helpful when using broader ideas from a text or for using a large portion of text; in such cases, quotes would prove unwieldy. In paraphrasing, the basic meaning of the original text remains, but the ideas have been restated in the current author's own words.

To paraphrase, the writer should read over the original text until comfortable with the ideas. Then the writer should set the text aside and explain the text in his or her own words. A helpful question is "What do I think this information shows?" Remember that the borrowed ideas are being used to prove a point. Rarely does a business writer merely need to summarize another text.

Original text: Socially responsible managers are needed to force us to confront new areas of thought, to challenge, to inspire, to mentor, to lead. Some companies are fortunate because these people exist in their midst. Those companies that do not possess, recruit, or foster managers with well-developed ideals for social responsibility leave themselves open to potential dilemmas orchestrated on their behalf by a staff whose perspectives may be far from socially responsible. Errant actions may not come to light immediately, but when they do the downside to the corporation can be its own annihilation. (Svansson & Wood, 2008, p. 311)

Paraphrase: Corporations should consider training organizational leaders in business ethics in order to encourage ethical behavior throughout the company. Trained leaders promote a more socially responsible business focus, both in their own actions and in the actions of their employees (Svensson & Wood, 2008).

Notice that the paraphrase retains the basic meaning of the original text, but the new sentences differ from the original sentences. The paraphrased version is less detailed and reflects the borrower's intent.

When paraphrasing, only an occasional short phrase may be repeated without risk of plagiarism. If more than one or two phrases need to be repeated, the sentences should be constructed as a partial quote with the appropriate quotation marks.

As a rule of thumb, quote all or part of the author's words when difficulties in paraphrasing arise. Do <u>not</u> take the risk of plagiarizing.

Visuals and Data

When using visuals, data, or other discrete material, acknowledge the source where the material is located. For material such as pictures or data tables, which may be set apart from the text, acknowledge the source both at the location of the material and with the description of the material in the text.

CHAPTER FIVE
REFERENCES

When referencing borrowed material is deemed necessary, the preferred citation format for Loyola College of Business is APA (American Psychological Association). The *Publication Manual of the American Psychological Association* provides specific information for citing a wide variety of sources. This chapter will cover the core concepts of referencing and the formats of common types of sources.

In APA style, an **in-text citation** (set in parentheses) marks the borrowed material and provides cursory information about the source. The full citation entry is then found in the **reference list**, at the end of the document.

IN-TEXT CITATIONS

In the text, citations are marked by parentheses enclosing **author information** and the **year of publication**. A citation will usually go at the end of the sentence (or in a logical sentence break). If practical, the citation should stand by a punctuation mark (usually a period). Note that the citation falls within the sentence punctuation (except for block quotes; see the preceding chapter).

> *The expanding interest in services marketing is partially related to economic trends such as the deregulation of various service industries and the growth of franchising (Lovelock 1984).*

When quoting directly, include the **page number(s)** within the parentheses.

> *Zeithaml agrees: "The quality of services, and their ability to satisfy the consumer, depend not only on how well the service provider performs, but also on how well the consumer performs" (1981, p. 187).*

When using the author's name within the sentence, repeating the name in the citation is not necessary; just use the year of publication in parentheses:

> *Grönroos (1985) has suggested that services are performances that are evaluated for the technical and functional excellence of the service worker and his or her support.*

If the source has two or three listed authors, use the last names of all authors. For four or more authors, in the first reference, use all authors' names; in subsequent references, use the first author's last name and then "et al."

> *Other contemporary issues facing services include efforts to personalize services (Surprenant & Solomon 1985).*

> *Companies need to invest in training managers to be socially responsible leaders (Michaels, Ivanov, & Kors, 2010).*

> *The often subtle yet pervasive influence of a service's physical setting cannot be overlooked (Lovelock et al., 1981).*

If the source has no identified author, use instead the element that would first appear in the full citation form—usually the editor's name or the title of the publication.

> *One retailer successfully using extensive sales training is Nordstrom (Advertising Age, 1987).*

A secondary citation is used when quoting or paraphrasing a source that cites another source. In other words, the writer uses a secondary source instead of the original. *Avoid secondary citations*. Find and cite the original sources rather than secondary sources. Nonetheless, if the original source is unavailable, use the following format in text:

> *Education, as a source of liberation (Freire, 1972; as cited in Svensson & Wood, 2008, p. 309), has also served to raise the social consciousness of consumers.*

THE REFERENCE LIST

The reference list contains full bibliographical information for each source used in the paper. All sources referenced in the body of the paper must be listed on the references page. Each reference entry must be single spaced with a hanging indention of ½ inch. (A hanging indention is when the first line of an entry is flush against the left margin and subsequent lines are indented.) Separate entries with one full space.

References should be listed alphabetically by the author's last name. If no author, alphabetize by the editor's name or, if no editor, the title of the publication.

Microsoft Word Tip – Hanging Indention

Hanging indention is when the first line of text is flush with the left margin and the remaining lines in the paragraph are indented. This style of indention is commonly used for reference lists. Hanging indention can be created in two ways.

The first method is to set the indention through the Paragraph dialog box. Open the box by selecting the arrow at the bottom right of the Paragraph menu on the Home tab. Next, in the "Indention" section, click on the "Special" menu and choose "Hanging."

The second method is to use the ruler to set the indention. Select the text to indent, then click on the bottom of the two slider arrows at the left of the ruler at the top of the page. (If the ruler is not visible, click on the ruler toggle button at the top of the slider bar to the right of the screen.) This arrow button will adjust the indention of subsequent lines of text. Move the arrow to the right until it reaches the desired distance (usually ½ inch).

CITATION FORMATS

Following are examples of reference formats for different types of sources. Note carefully the order of information, the formatting, and the punctuation. For more details, or for formats of sources not included here, refer to the APA guide (*Publication Manual of the American Psychological Association*).

Books

Pirsig, R. M. (1974). *Zen and the art of motorcycle maintenance: An inquiry into values*. New York, NY: Bantam Books.

Tapscott, D., & Caston, A. (1993). *Paradigm shift: The new promise of information technology.* New York, NY: McGraw-Hill.

Brown, S. W., Gummesson, E., Edvardsson, B., & Gustavsson, B. (Eds.). (1991). *Service quality: Multidisciplinary and multinational perspective*. Lexington, MA: Lexington Books.

Collins, D. (2009). *Essentials of business ethics: Creating an organization of high integrity and superior performance* [Adobe DRM EPUB version]. Retrieved from http://www.kobobooks.com/ebooks

Bitner, M., & Brown, S. W. (1992). Services marketing. In R. Willis (Ed.), *AMA management handbook*. Chicago, IL: American Management Association.

Journals

Bitner, M. (1992). Servicescapes: The impact of physical surroundings on customers and employees. *Journal of Marketing*, *56*(April), 57-71.

Svensson, G. & Wood, G. (2008). A model of business ethics. *Journal of Business Ethics, 77*(3), 303-322. doi: 10.1007/s10551-007-9351-2

Magazines or Newspapers

Engardio, P. (1994, December 19-26). Why sweet deals are going sour in China. *Bloomberg Businessweek*, 50-51.

Fisk, R. P. (1995, January 7). New insights on the Peter Principle: My years as an interim chair. *Wall Street Journal*, 1-2.

Lukas, P. (2013, March 29). No more Mr. Nice Dolphin: Miami unveils a new logo. *Bloomberg Businessweek*. Retrieved from http://www.businessweek.com/articles/2013-03-29/no-more-mr-dot-nice-dolphin-miami-unveils-new-logo#r=read

Conference Proceedings

Dabholkar, P. A. (1991). Using technology-based self-service options to improve perceived service quality. In M. C. Gilly, F. R. Dwyer, T. W. Leigh, A. J. Dubinsky, M. L. Richins, D. Curry, … & G. E. Hills (Eds.), *1991 AMA educators' proceedings: Enhancing knowledge development in marketing* (pp. 534-535). Chicago, IL: American Marketing Association.

Government Documents and Technical and Research Reports

If no identified author(s), list government documents and technical reports by the name of the agency that produced the report.

U.S. Bureau of the Census. (1983). *Statistical abstract of the United States: 1984* (104th ed.). Washington, DC: Author. Retrieved from http://www2.census.gov/prod2/statcomp/documents/1984-01.pdf

Swyt, D. (1998). *Experiences in initiation Baldrige-based quality in an NIST technical division* (NIST Interagency/Internal Report No. 6201). Retrieved from National Institute of Standards and Technology website: http://www.nist.gov/manuscript-publication-search.cfm?pub_id=823104

Electronic Sources

Sinek, S. (2009, September). How great leaders inspire action [Video file]. Retrieved from http://www.ted.com/playlists/60/work_smarter.html.

American Marketing Association. (2002). About the AMA [Website]. Retrieved from http://www.marketingpower.com

Rubin, G. (2012, August 23). Secrets of adulthood: Achieve more by working less [Web log post]. Retrieved from http://www.happiness-project.com/happiness_project/2012/08/secret-of-adulthood-achieve-more-by-working-less/

Miscellaneous Works

References to doctoral dissertations, class notes, working papers, brochures, corporate seminars, company documents, annual reports, etc., should be included in the reference list as follows. As a rule, miscellaneous works should not be major reference sources for the paper. Any exceptions to this rule must be approved by the professor.

Lewis, J. R. (1992). *A conceptual and empirical analysis of prospect theory in a services marketing setting* (Doctoral dissertation). University of Texas, Austin, TX.

Macharaga, T. G. (2012). *A comparison of holistic management decision making and traditional decision making in farming among family farmers* (Doctoral dissertation). Available from Proquest Dissertations and Theses database. (Document ID No. 1266824731)

Macharaga, T. G. (2012). *A comparison of holistic management decision making and traditional decision making in farming among family farmers* (Doctoral dissertation). Retrieved from http://ezproxy.loyno.edu/login?url=http://search.proquest.com/docview/1266824731?accountid=12168

Fisk, R. P. (1997, January 28). *Marketing research* [Class notes]. International Marketing (Course), University of New Orleans, New Orleans, LA.

Goolsby, J. R. (1990). *Nonsurgical alternatives to lobotomy: A report from the wasteland*. Unpublished manuscript, Oklahoma State University, Stillwater, OK.

Greater New Orleans Chamber of Commerce. (1999). *Welcome to New Orleans* [Brochure].

Hibernia Bank. (1999, May 15). *Our financial services for small businesses*. Corporate seminar presented in New Orleans, LA.

Xerox Corporation. (2005). *Annual report for 2004*. Retrieved from http://news.xerox.com/investors/reports

Because **personal communication** (interviews, e-mails, or telephone conversations, etc.) does not provide information that can be recovered or accessed by the public, these sources are cited in the text but do not have an entry in the reference list.

(M. Garcia, telephone interview February 1, 1998)

If a recording or transcription of an interview is available in an archive or other collection, provide an entry in the reference list.

Martin, S. (1992, January 14). Interview by N. L. Jones [Tape recording]. American Management Association. AMA Archives, San Francisco, CA.

Multiple Citations

Differentiate two or more works published in the same year by the same author by alphabetizing the works by title and then placing an "a" beside the year of the first article and a "b" by the year on the next, and so on (e.g., 1977a, 1977b, 1977c, etc.). The citations in the text of the paper use the same year-letter designations.

Wind, Y. (1977a). Brand loyalty and vulnerability. In A. Woodside, J. N. Sheth, & P. D. Bennett (Eds.), *Consumer and industrial buying behavior*, pp. 313-319. New York, NY: American Elsevier.

Wind, Y. (1977b). The perception of the firm's competitive position. In F. M. Nicosia & Y. Wind (Eds.), *Behavioral models of market analysis: Foundations for marketing action.* Hinsdale, IL: The Dryden Press.

Reprints

If the source is a reprint, list the reprinted source first and then the original source.

Grönroos, C. (1989). Innovative marketing strategies in organization structures for service firms. In J. E.
G. Bateson, *Managing services marketing: Text and readings*, p. 506-521, Orlando, FL: Dryden
Press. (Reprinted from *Emerging perspectives on services marketing*, pp. 9-21, by L. L. Berry, G. L.
Shostack, & G. D. Upah (Eds.), 1983, Chicago, IL: American Marketing Association)

The in-text citation would include the years for both sources: (Grönroos, 1983/1989)

Secondary Citations

Avoid secondary citations. (See the definition of secondary citations on page 60.) Instead, find and cite
the original source. If the original source is unavailable, use one of the following formats to cite in-text.
In the reference list, give only the secondary source (since that was the source used).

In text: (Freire, 1972; as cited in Svensson & Wood, 2008, p. 309)

                Freire's study (as cited in Svensson & Wood, 2008, p. 309)

Reference list: Svensson, G. & Wood, G. (2008). A model of business ethics. *Journal of Business Ethics,*
                77(3), 303-322. doi: 10.1007/s10551-007-9351-2

CHAPTER SIX
PRE-WRITING AND REVISION

Pre-writing and revision are critical aspects of writing. Making time for these stages invariably results in a more effective text. This chapter will discuss crucial elements and useful strategies to help with these two stages.

PRE-WRITING

Before writing, take the time to plan the direction and organization of the document to be written. The amount of time and focus spent on this stage can vary depending on the writer and the context for communication, but at the very least a writer needs to identify three elements:

1. The audience
2. The message to be communicated
3. The main ideas to be included

These three elements give the document the direction and support needed to communicate successfully.

Direction

Every text needs to take the reader from Point A to Point B. Identifying the audience helps to establish the starting point.

> *Who is the target audience?*
> *What does this audience already know about this topic?*
> *What is this audience interested in?*

For example, a group of doctors will have different area of knowledge and different interests than a group of bankers; if the CEO of a pharmacological company were to present to these two groups, he or she would need to modify the presentation to reflect the different starting points of these two groups.

Defining the message to be communicated—the ending point or the "takeaway"—is the next step. After reading (or even skimming) the document, the reader should have grasped the main idea that the writer wishes to communicate. If the main idea is not defined before writing, then the idea is likely to be unclear.

> *What is the main idea that the audience should understand?*

Support

After determining the direction that the document will take, determine what ideas will support the main idea. Here are some questions to help this process:

> *Why is this idea important to the audience?*
> *What information will the audience need to know to understand this message?*

After identifying how the message will be supported, the writer can spend some time organizing ideas further or can begin writing.

LEARN MORE	See the resource handouts "Pre-Writing Guide" and "Revision Practices" to learn more about these stages of writing.

REVISION

Prepare a document enough in advance in order to make corrections before deadlines. The lack of adequate editing is the most common source of students' writing problems (*i.e.*, the writer hurriedly prepares the document, doing a sloppy job, and leaves no time for revision). Whether writing a lengthy report or a quick e-mail reply, always review and revise before sharing or sending.

Obtaining Objectivity

The difficulty with revising one's own writing lies in objectivity. After being immersed in the ideas, the writer has difficulty finding enough distance from the text to read objectively enough to catch errors and avoid unconsciously filling in gaps between ideas. The following strategies help writers to obtain objectivity and make revision more effective.

1. **Create Separation**
    The ideal situation would be to write the document and then allow time to pass before returning for revision with fresh eyes. Such separation may not be possible; therefore the next tactics can help to force objectivity.

2. **Read Aloud**
    If a text is short enough, read the draft aloud. Reading aloud slows down the mind and focuses the attention on the words. Another option would be to point to each word with a pen or a pencil.

3. **Read Backward**
    Like reading aloud, reading a text backward prevents the mind from skipping over words and ideas. Starting from the end of the paper, work backward sentence by sentence. Placing a piece of paper or a ruler over preceding lines of text will help to focus attention on the sentence at hand.

WRITING TIP	**Never Assume.** Do not assume that the reader can fill in gaps in information or catch any intended joke. Explain ideas clearly and show connections between ideas. In personal communication, avoid sarcasm as the playful nature of the words may not be obvious.

Strategic Revision

The following techniques can aid in making revision time more efficient.

1. **Work from Big to Small**
   Focus revision efforts first on larger-scale issues (*e.g.*, structure of the paper, organization of ideas), next on mid-level issues (*e.g.*, articulation of ideas, sentence structure), and finally on small details (*e.g.*, grammar, punctuation, format). Perfecting the wording and punctuation of a sentence is pointless if the sentence ultimately needs to be omitted.

2. **Refer to the Main Point**
   Write down the main point of the text, that is, what readers will understand (or should be persuaded of) after reading. Evaluate each paragraph relative to this main point; every sentence and idea must contribute to driving the reader to the desired idea and conclusion.

3. **Make a List**
   Be aware of common errors, and check for those errors each time. A checklist of errors, whether the revision list in Appendix A or a personalized checklist, is helpful when revising. Also helpful to add are elements to check for consistency, such as the use of a particular acronym, the spelling of a certain word, or font size in tables.

4. **Use Multiple, Focused Run-Throughs**
   When focusing on the small details, such as punctuation or grammar, run through the paper multiple times, each time checking for only one issue. For example, in the first pass, look only for split infinitives. On the next pass, focus on a different issue, such as pronouns.

Microsoft Word Tip – Find and Replace

Use the Microsoft Word "Find" feature to search for problem areas. For example, to look for split infinitives, search for the word "to." You can easily scroll through the document to find and then check uses of the infinitive.

The "Find and Replace" feature may also be helpful, especially with commonly confused words, such as *compliment* and *complement*.

A word of caution: Errors may come in several forms, so be sure to read carefully and not rely solely on the "Find" feature. For example, a search for "he" would not catch "his" or "himself."

APPENDIX A: REVISION CHECKLIST

Content and Structure

_____ Does your text adequately respond to the assignment instructions?
_____ Did you include all necessary elements for the type of document (*e.g.*, a report would require a cover page, table of contents, executive summary, etc.)?
_____ Did you consider the audience (*i.e.*, choose appropriate tone, vocabulary, persuasive pitch)?
_____ Did you frame the content (*i.e.*, introduction, body, and conclusion)?
_____ Did you apply information (*i.e.*, explain the significance or benefits of ideas)?
_____ Are your sentences and paragraphs concise and to the point?

Referencing

_____ Did you appropriately incorporate quotes?
_____ Did you paraphrase carefully?
_____ Did you provide an in-text reference for information or material not original to you?
_____ Did you create a separate references page in your paper and title it "References"?
_____ Did you include in the reference list all sources that you used within the text of your paper?
_____ Are your in-text citations and reference list correctly formatted using APA style?
_____ Are your references listed in alphabetical order?

Grammatical

_____ Did you spell all words correctly?
_____ Do subject and verb tenses match in each sentence?
_____ Did you avoid double negatives?
_____ Did you avoid ambiguous or overabundant pronouns?
_____ Did you avoid splitting infinitives?
_____ Did you avoid colloquial language?
_____ Did you avoid ending sentences with prepositions?
_____ Did you avoid using contractions?
_____ Did you incorrectly use any of the words and phrases mentioned Chapter 2, Section 2?
_____ Did you use the active and passive voices appropriately?
_____ Did you avoid excessive repetition of words between sentences?

Mechanical

_____ Did you bind your paper as instructed by your professor?
_____ Did you format various document elements (*e.g.*, cover page, table of contents) as instructed?
_____ Did you space your paper as instructed by your professor?
_____ Did you format consistently any headings, subheadings, and visual supports?
_____ Did you use the correct indentions for paragraphs and long quotes?
_____ Did you use one-inch margins?
_____ Did you use an appropriate font and font size?
_____ Are all pages properly paginated?
_____ Were you careful not to leave widows or orphans?
_____ Are items numbered correctly (numbered lists, figures, etc.)?

APPENDIX B: PROOFREADING MARKS

OPERATIONAL SIGNS

℘	Delete
⌒	Close up; delete space
℘	Delete and close up (use only when deleting letters *within* a word)
(stet)	Let it stand
#	Insert space
(eq #)	Make space between words equal; make space between lines equal
(hr #)	Insert hair space
(ls)	Letterspace
¶	Begin new paragraph
□	Indent type one em from left or right
]	Move right
[	Move left
][	Center
⊓	Move up
⊔	Move down
(fl)	Flush left
(fr)	Flush right
=	Straighten type; align horizontally
‖	Align vertically
(tr)	Transpose
(sp)	Spell out

TYPOGRAPHICAL SIGNS

(ital)	Set in italic type
(rom)	Set in roman type
(bf)	Set in boldface type
(lc)	Set in lowercase
(caps)	Set in capital letters
(sc)	Set in small capitals
(wf)	Wrong font; set in correct type
X	Check type image; remove blemish
V	Insert here *or* make superscript
∧	Insert here *or* make subscript

PUNCTUATION MARKS

⌄	Insert comma
⌄ ⌄	Insert apostrophe *or* single quotation mark
⌄ ⌄	Insert quotation marks
⊙	Insert period
(set) ?	Insert question mark
;	Insert semicolon
⌄ or :	Insert colon
=	Insert hyphen
M	Insert em dash
N	Insert en dash
{|} or (|)	Insert parentheses

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APPENDIX C: STATE ABBREVIATIONS

State Name	Abbreviation	Postal Code
Alabama	Ala.	AL
Alaska	Alaska	AK
Arizona	Ariz.	AZ
Arkansas	Ark.	AR
California	Calif.	CA
Colorado	Colo.	CO
Connecticut	Conn.	CT
Delaware	Del.	DE
Florida	Fla.	FL
Georgia	Ga.	GA
Hawaii	Hawaii	HI
Idaho	Idaho	ID
Illinois	Ill.	IL
Indiana	Ind.	IN
Iowa	Iowa	IA
Kansas	Kans.	KS
Kentucky	Ky.	KY
Louisiana	La.	LA
Maine	Maine	ME
Maryland	Md.	MD
Massachusetts	Mass.	MA
Michigan	Mich.	MI
Minnesota	Minn.	MN
Mississippi	Miss.	MS
Missouri	Mo.	MO
Montana	Mont.	MT
Nebraska	Nebr.	NE
Nevada	Nev.	NV
New Hampshire	N.H.	NH
New Jersey	N.J.	NJ
New Mexico	N.M.	NM
New York	N.Y.	NY
North Carolina	N.C.	NC
North Dakota	N.D.	ND

State Name	Abbreviation	Postal Code
Ohio	Ohio	OH
Oklahoma	Okla.	OK
Oregon	Oreg.	OR
Pennsylvania	Pa.	PA
Rhode Island	R.I.	RI
South Carolina	S.C.	SC
South Dakota	S.D.	SD
Tennessee	Tenn.	TN
Texas	Texas	TX
Utah	Utah	UT
Vermont	Vt.	VT
Virginia	Va.	VA
Washington	Wash.	WA
West Virgina	W.Va.	WV
Wisconsin	Wis.	WI
Wyoming	Wyo.	WY

APPENDIX D: WRITING ABOUT LOYOLA UNIVERSITY NEW ORLEANS

Official name	First mention	Subsequent references
Loyola University New Orleans	Loyola University New Orleans	Loyola
Loyola University New Orleans College of Business Joseph A. Butt, S.J. College of Business	Loyola University New Orleans College of Business	college of business Loyola
Loyola University New Orleans MBA Program	Loyola University New Orleans MBA Program	the MBA program Loyola's MBA program
Center for Spiritual Capital	Center for Spiritual Capital	the center
Business Portfolio Program	Business Portfolio Program	Portfolio the program
Executive Mentor Program	Executive Mentor Program	the program
J. Edgar and Louise S. Monroe Library	Monroe Library	the library Monroe

APPENDIX E: GRADING RUBRICS

1. Writing Rubric

Topic	Unacceptable (0-83)	Acceptable (84-94)	Exemplary (95-100)	Score	Weight
Grammar					20%
Punctuation					20%
Professional Presentation					20%
Clarity					30%
Understandable Data Analysis					5%
References					5%

2. Presentation Rubric: PRO Model (Power, Relationship, Organization of Evidence)

Organization of Evidence:	
_____ Introduction	
• Attention getter	
• Credibility	
• Preview	
_____ Use of Persuasive Evidence or Examples	
• Point 1: Evidence or Example?	
• Point 2: Evidence or Example?	
• Point 3: Evidence or Example?	
• Effective use of transitions	
_____ Effectiveness of Conclusion	
• Review	
• Final Thoughts	
Power and Relationship:	
_____ Power	
• Powerful stance and body language	
• Strong voice projection	
• Dressed professionally	
• Lack of interrupters (*e.g.*, "umm," "like")	
_____ Relationship	
• Comfortable or natural movements	
• Effective hand gestures	
• Pleasant expression	
• Eye contact	
Strengths:	
Opportunity for Improvement:	

APPENDIX F: LEARNING RESOURCES

Many books and Web sites provide useful information on writing and grammar. The following list provides resources for learning and practicing the concepts covered in this writing guide.

Grammar and Mechanics

The Business Writer's Handbook, by G. J. Alred, C. T. Brusaw, and W. E. Oliu.
>Among other things, this book covers grammar, mechanics, and style as they relate to business writing.

Merriam-Webster's Manual for Writers and Editors
>This book's grammar section goes in depth into the concepts, making it a good resource if you want to learn precisely the many uses of a comma.

Grammar Girl: Quick and Dirty Tips, *grammar.quickanddirtytips.com*
>This website explores common questions and puzzles related to grammar. You can search for a specific grammatical concept, such as the difference between "each other" and "one another," and find a knowledgeable, easy-to-read explanation.

Walden University Writing Center, *writingcenter.waldenu.edu/Grammar-and-ELL.htm*
>This writing center's grammar page has a good list of common grammatical concerns. Of special interest are the quizzes that help to practice the concepts.

University of Ottawa Academic Writing Help Centre, *www.sass.uottawa.ca/writing/kit/grammar.php*
>The AWHC's Writing Kit contains online documents covering a number of grammatical concepts. They can be downloaded as PDFs for easy reference. The writing kits cover a number of other writing topics as well.

Business Writing

The Business Writer's Handbook, by G. J. Alred, C. T. Brusaw, and W. E. Oliu.
>Topics of interest include various types of business documents, logic and organization of ideas, correspondence, presentations, layout and visuals, and research.

AMA Handbook of Business Writing (2010) by K. Wilson and J. Wauson
>This book describes a number of different business document formats as well as contains information on micro-level and macro-level elements of writing.

The Write Approach: Techniques for Effective Business Writing, by O. Stockard
>This book explores some of the underlying concepts important to business writing and provides a series of lessons to improve writing skills.

REFERENCES

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