

management communication

A Guide

A N D R E W S

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Proposals

Using the format of a memo, a letter, or an e-mail, you may write two important genres of managerial communication: a proposal and a report (see Chapter 5 for more about genre). You may also give each of these genres full-dress treatment as a longer, self-standing document (see Appendix B). The conventions of the genre help you select and structure the content of your message. This section briefly discusses proposals; the next discusses final reports. Both are significant as you develop a repertoire of genres that interrelate to accomplish your personal and organizational goals.

A proposal is an offer to provide a product or service or to do some kind of work to solve a problem. In a *solicited* proposal, you respond to someone's request for your work (the "request for proposal" or RFP). An *unsolicited* proposal derives from your own initiative. You have, for example, an idea for speeding up the collection of receivables. You then suggest your idea to someone who can profit from it. As a rule, a solicited proposal sells the answer, whereas an unsolicited proposal explains the problem—and then sells the answer. The length and design of proposals differ widely, but the structure presented in Figure 8.1 should help you start your planning.

In writing a proposal, follow these guidelines:

- Develop one core idea and make sure it governs every part of the proposal. Don't be afraid to repeat it ("Our benefits management program serves both you and your employees.").
- Think in the audience's terms. Avoid a list of "I want" sentences. State features of your solution as benefits to the audience ("Your employees will welcome our easy-to-read reports." "Daily reporting features keep all records current." "Careful monitoring of claims and payments saves you money.").
- Use the audience's language, particularly repeating any key terms or concepts in the request for your proposal.
- Use the present tense for general descriptions and the future for actions in the future. You and the reader both know that future steps depend on acceptance of the proposal, so you don't need the conditional (The work *would be done* . . .).

Introduction

Summarizes your proposed activity by stressing benefits to the reader. Provides the context by briefly restating the problem (if the proposal is solicited) or establishing the problem's background and urgency (if unsolicited). Provides an overview of the content and plan of the proposal for a wide readership.

Statement of Problem

Identifies the problem necessitating the proposed work, with enough detail to make the problem clear to the reader. Provides a review of relevant literature, if that is needed to establish the significance or dimensions of the problem.

Objective(s)

Lists the specific, measurable outcomes you plan to accomplish. Explains the solution you will propose. In a research proposal, shows that your work will contribute to the theme established by a funding agency, client, or sponsor.

Method or Activities

Explains either how you will implement your solution (if the solution is known) or how you will conduct research to support your hypothesis about the solution (if it is unknown). Ties the activities directly to your objectives. Convinces the reader that your approach is reasonable, suited to your resources in people and facilities, likely to succeed, and better than the competitors'. May include a review of literature to show how the proposed approach derives from but improves on that of other workers, and is innovative and distinctive. Notes compliance with any federal, state, or local laws in undertaking the work. Indicates your procedures for ensuring quality control.

Management

In a collaborative proposal effort, shows how the team will be coordinated, scheduled, and monitored. Profiles the key staff along with the extent of their participation in the proposed project (extended biographies may be included in an appendix).

Schedule

Places your implementation or research activities on a time line. Convinces the audience that the time line is realistic. Serves as the proposal at a glance.

Justification

Answers the question "Why you?" Provides your track record of relevant accomplishments. Assures the reader that adequate staff and facilities are available to carry out the project as outlined. Describes laboratory or field sites, specialized equipment, and computer and other information systems matched to the tasks. Convinces the audience that the project is worth doing.

Figure 8.1 | Typical Content of Segments of a Proposal

Budget

Assigns monetary values to all activities or resources mentioned in the proposal. Often read first as, in effect, the quantitative abstract of the proposal. Divides the total budget into categories.

Figure 8.1 | Typical Content of Segments of a Proposal
Cont.

Final Reports

A *report* is an account of some activity and what it adds up to, and *reporting* is a key managerial task. A report may aim mainly to inform the reader (as in a summary of account activities over the last year) or to persuade (as in a report recommending the expansion of the company's business into Montréal, Canada). Because reports differ greatly in purpose, audience, and structure, you'll have to adjust your design to the situation at hand (see Appendix B). Figure 8.2 presents a series of questions to consider in creating the final report on an investigation.

In general, in writing a long report addressing multiple readers you should

- provide several points of access to different parts that match different reader interests, including headings, a table of contents, and perhaps cover letters that direct different users to different sections.
- brief all readers, no matter what their particular interests, in an executive summary (see Appendix B) and general introduction.
- build in redundancy so everyone will read the main points even if no one reads straight through.
- give the answer up front unless you anticipate resistance or your audience prefers an indirect approach. Avoid simply reporting on what you did in the order in which you did it.

Introduction

- Who asked me to look into this?
- Why did they ask our team or me?
- Why did they see this as a problem?
- Who else knows about this and has written about it (review of literature)?
- Has anything happened like this in the company or as recorded in the literature before?
- If so, what was the outcome then?
- What limits did I have in solving this (budget, time, overlap with someone else's responsibility)?
- What priority does this have in the company?
- What was I specifically asked to do?
- Are there any hidden agendas?

Methods

- Where did I look for information?
- What chief areas did I study?
- Whom did I talk with?
- What did I read?
- What surveys or observations did I make?
- What tools or machines did I use?

Results

- What results did I obtain from my work? What did I find out?
- Are these results accurate? How do I know?
- Are these results valid? How do I know?

Discussion

- Do the results show any trends? Short term? Long term?
- What do they add up to?
- How do they relate to other findings?
- Do the conclusions match my assignment?
- Have I overlooked anything I was asked to do?
- So what? In the reader's terms, and the organization's terms, what does all this matter? Future work?

Figure 8.2 Structuring Information for the Final Report on an Investigation

Follow your organization's format guidelines when you write a memo or letter. These formats may be embedded in a networked word processing system. For reports, follow any format requirements set by the audience; if a format isn't specified, then follow the format typical in your organization. This appendix provides common U.S. conventions for formatting memos, letters, and reports. Use these if you are writing on your own or if your company does not have a standard.

Memo

The standard heading of a memo (preset in most e-mail systems) includes four elements, usually in the following order:

Date:

To: (Name of one reader or a distribution list)

From: (You—your name and perhaps your title)

Subject: (Title of your message, key words)

Most e-mail systems and preprinted memo forms also include a cc line in the header (carbon copy) to name secondary readers. E-mail systems also allow you to create a "rich" header to, for example, send "blind carbon copies." Use this function when you send a message to many recipients. It saves readers the need to scroll through long mailing lists and protects the privacy of the list. To sign a print memo, depending on your relationship with the reader, either write your first name or initials on the "from" line (friendly) or sign at the end (more formal).

Report

To give a report or proposal (see Chapter 8) full treatment, include the following ancillary elements around the core discussion:

Front Matter

Letter or Memo of Transmittal Presents and individualizes the report for a particular reader, reviews authorization and date, reminds the reader about any changes in scope in the project, acknowledges assistance, thanks the reader.

Title Page Title (of course—brief, clear, and comprehensive); names (and organization) of the author(s); name(s) (and organization) of the audience; date; and other necessary information about the report's origin and use. Use this as a design feature.

Table of Contents List of the report's headings, in order, followed by page numbers. If the report contains many figures or exhibits, consider creating a separate *list of figures*.

Executive Summary or Abstract The report in a nutshell: main points, main evidence, main recommendations or conclusions. It should make sense on its own because some readers will read only the summary, not the report. *Inform* the reader (“We recommend expansion into Montreal”) rather than *describing* the report (“Our recommendation is given.”).

Back Matter

Appendixes (if appropriate) Supplemental material not essential to the development of the report, including copies of questionnaires, extended tabulations summarized in the report, detailed quotations. Each appendix should be labeled with both a letter (A, B, C . . .) and a title.

References Full citations for any sources used in preparing your report.

Exhibits Tables, graphs, and other visuals that supplement materials in the report.