

First Impressions

Unit. Technology

Problem Area. Format Business Documents

Lesson. First Impressions

- **Student Learning Objectives.** Instruction in this lesson should result in students achieving the following objectives:

- 1 Identify a variety of written communications in business.**
- 2 Analyze and evaluate the positive and negative characteristics of written communication in business.**
- 3 Proofread for correct business format and English conventions.**

- **List of Resources.** The following resources may be useful in teaching this lesson:

Hyden, Janet S., Ann K. Jordan, and Mary Helen Steinauer. *Communicating for Success*. Third Edition. Ohio, USA: Thomson South-Western, 2006.

Johnson, Jack E., et al. *Keyboarding with Computer Applications*. Ohio, USA: McGraw-Hill Companies, 2007.

Hoggatt, Jack P., Jon A. Shank, and Jerry W. Robinson. *Century 21 Computer Applications & Keyboarding*. Seventh Edition. Ohio, USA: Thomson South-Western, 2002.



■ List of Equipment, Tools, Supplies, and Facilities

- ✓ Overhead or PowerPoint projector
- ✓ Visual(s) from accompanying master(s)
- ✓ Copies of sample test, lab sheet(s), and/or other items designed for duplication
- ✓ Materials listed on duplicated items
- ✓ Computers with Internet access
- ✓ Classroom resource and reference materials
- ✓ Bulletin board

■ Terms. The following terms are presented in this lesson (shown in bold italics):

- ▶ business letter
- ▶ cover letter
- ▶ e-mail
- ▶ job objective
- ▶ letterhead
- ▶ memorandum
- ▶ personal business letter
- ▶ recipient
- ▶ reference initials
- ▶ résumé
- ▶ salutation
- ▶ sender
- ▶ subject line

■ Interest Approach. Use an interest approach that will prepare the students for the lesson. Teachers often develop approaches for their unique class and student situation. Some possible approaches are included here.

Approach One: Hang a variety of business documents (both good and poor) on the bulletin board for students to discover. Through discussion and the use of a template, students identify as many of the documents as possible.

Approach Two: Present the students with a situation in which they purchased an item and within 30 days the item becomes defective. List the forms of communication to use to contact the company that produces this item.

SUMMARY OF CONTENT AND TEACHING STRATEGIES

Objective 1: Identify a variety of written communications in business.

Anticipated Problem: What are written communications in business?

- I. Identify various forms of written business communication.
 - A. **E-Mail** (electronic mail)—a method of sending and receiving messages electronically between personal computers over a computer network
 1. Format of e-mail
 - a. Name of the **recipient**, or the person receiving the message
 - b. Name of the **sender**, or the person writing or sending the message
 - c. **Subject line**, or main topic
 - d. Body
 - B. **Memorandum** (memo), or a written message sent from one person to another within the same organization or business
 1. Similar to e-mail
 2. Format of memo
 - a. Heading: Memo or Memorandum
 - b. Recipient's name
 - c. Sender's name
 - d. Date
 - e. Subject line (in all caps)
 - f. Body
 - C. **Business letter**, or a letter that represents a company, not an individual
 1. Printed on company stationery called **letterhead**
 2. More formal than a personal letter
 3. Format of business letter
 - a. Letterhead
 - b. Current date
 - c. Recipient's name and address
 - d. Greeting, or **salutation**
 - e. Body
 - f. Closing
 - g. Writer's handwritten signature
 - h. Writer's typed name and title

- i. **Reference initials**, or initials of the person keying the letter
 - (1) Used only when letter is keyed by someone other than the writer
- D. **Personal business letter**, or a letter from an individual to a business
 - 1. More formal than a personal letter to a friend or relative
 - 2. **Cover letter**, or a personal business letter sent with other documents to explain more fully one's qualifications
 - 3. Format of personal business letter
 - a. Writer's street address
 - b. Writer's city, state, and ZIP code
 - c. Current date
 - d. Recipient's name and address
 - e. Greeting, or salutation
 - f. Body
 - g. Closing
 - h. Writer's handwritten signature
 - i. Writer's typed name
- E. **Résumé**, or a brief description of one's professional or work experience and qualifications
 - 1. Parts of a résumé
 - a. Personal information
 - b. **Job objective**, or a brief statement of one's employment goal
 - c. Education
 - d. Work/volunteer experience
 - e. Awards/accomplishments

Many techniques can be used to help students master this objective. VM–A, VM–B, and VM–C illustrate the positive characteristics of business documents.

Objective 2: Analyze and evaluate the positive and negative characteristics of written communication in business.

Anticipated Problem: What are some of the good and bad characteristics of business documents?

- II. Analyze formats/dialog of the various documents.
 - A. E-mail
 - 1. Positives
 - a. Offer a short summary of the e-mail in the subject line.
 - b. Keep message clear and concise.
 - c. Use good spelling and grammar.

2. Negatives
 - a. Avoid using all caps in the subject line.
 - b. Avoid computer symbols and computer abbreviations, such as “u” for “you.”
 - c. Avoid abbreviations unless appropriately defined.
- B. Memo
 1. Positives
 - a. Keep message clear and concise.
 - b. Use good spelling and grammar.
 2. Negatives
 - a. Avoid language that may be misinterpreted.
 - b. Avoid inconsistency in formatting.
- C. Business letter
 1. Positives
 - a. Address letter to an individual if possible.
 - b. Keep letter formal.
 - c. Keep message clear and concise.
 - d. Use good spelling and grammar.
 2. Negatives
 - a. Avoid inconsistency in formatting.
 - b. Avoid language that may be misinterpreted.
- D. Cover letter
 1. Positives
 - a. Create three or four paragraphs.
 - b. Keep document brief but easy to read.
 - c. Demonstrate a professional, thoughtful approach.
 - d. Keep document formal.
 - e. Use good spelling and grammar.
 2. Negatives
 - a. Avoid using slang.
 - b. Avoid writing with a disjointed approach.
 - d. Avoid “cute” fonts.
 - e. Avoid the form-letter approach.
- E. Résumé
 1. Positives
 - a. Keep résumé to one page.
 - b. State a job objective for each position.
 - c. Explain time gaps.
 - d. Keep résumé clear, concise, and professional.

- e. Key résumé, using standard fonts.
 - f. Check for spelling and grammar errors.
2. Negatives
- a. Avoid the use of “I,” etc.
 - b. Avoid skipping a job or lapse in employment.
 - c. Avoid colored paper.
 - d. Avoid “cute” fonts.
 - e. Avoid small type.

Many techniques can be used to help students master this objective. Use VM–D and VM–E to illustrate poor formatting of business documents. Give the students a packet of business documents. Using the formats given, discuss which look better than others.

Objective 3: Proofread for correct business format and English conventions.

Anticipated Problem: What types of errors are found in business documents?

- III. Proofread documents for errors.
 - A. Formatting
 - B. Spelling and grammar

Many techniques can be used to help students master this objective. Use VM–D and VM–E as student worksheets. Have students find errors and discuss corrections.

- **Review/Summary.** Use the student learning objectives to summarize the lesson. Have students explain the content associated with each objective. Student responses can be used in determining which objectives need to be reviewed or taught from a different angle. Questions at the ends of chapters in the textbook may also be used in the review/summary.
- **Application.** Use the included visual master(s) and lab sheet(s) to apply the information presented in the lesson.
- **Evaluation.** Evaluation should focus on student achievement of the objectives for the lesson. Various techniques can be used, such as student performance on the application activities. A sample written test is provided.

■ Answers to Sample Test:

Part One: Matching

1. f
2. j
3. e
4. a
5. i
6. b
7. d
8. h
9. c
10. g

First Impressions

▶ Matching

Instructions: Match the term with the correct definition.

- | | |
|--------------------|-----------------------------|
| a. cover letter | f. personal business letter |
| b. recipient | g. résumé |
| c. salutation | h. business letter |
| d. electronic mail | i. sender |
| e. subject | j. reference initials |

- ____ 1. A letter from an individual to a business
- ____ 2. The initials of the person keying the letter
- ____ 3. The main topic of the document
- ____ 4. A personal business letter sent with other documents to explain one's qualifications more fully
- ____ 5. The person writing or sending the message or letter
- ____ 6. The person receiving the message or letter
- ____ 7. A method of sending and receiving messages electronically
- ____ 8. A letter that represents a company, not an individual
- ____ 9. The greeting
- ____ 10. A brief description of one's professional or work experience and qualifications



Proofreading for Accuracy

Overview

Students in Business Education classes will analyze documents for correct grammar, spelling, punctuation, capitalization, and structure. Students will proofread business documents for English conventions. Students will be evaluated accordingly.

- ◆ *Format and Structure of Document:* Verify that document is formatted according to document specifications.
- ◆ *Usage of Proofreader's Marks:* Correctly identify and edit the documents.

Procedures

1. In order to write to communicate for a variety of purposes, students should experience sufficient learning opportunities to develop the following skill:
 - ◆ Proofread for correct English convention

Students employed in various business careers are required to use correct grammar, spelling, punctuation, capitalization, and structure when preparing business documents. This assessment aligns with the National Standards for Business Education—Communication (Written Communication Level 3).
2. Business Education students will review and discuss the assessment task and how the rubric will be used to grade their work.
3. Each student will read the document and analyze it for formatting and conventional English errors. The student will mark corrections and return the completed document to the instructor.
4. Each student's performance will be evaluated using the rubric. Add each student's scores to determine the performance level.

Time Requirements

One class period

Resources

- ◆ Student Instructions
- ◆ Student Worksheet
- ◆ Answer Key
- ◆ Scoring Rubric

Proofreading for Accuracy

Analyze the business document your instructor will give you for formatting, spelling, and grammatical errors.

1. Find the errors on your copy.
2. Either list the errors at the bottom of the document or use proofreader's marks to indicate corrections.
3. Turn in your document when finished.

You may use a dictionary if needed.



Proofreading for Accuracy

MEMORANDUM

TO: Andrew Jackson, Assistant Manger
FROM: Chad Smith, Manager
SUBJECT: PRESENTATION TO ASHLEY GOODE

Our new district manger, Ashley Good, will be visiting our St. Louis store on Tuesday, September 24. I would like you to prepare a brief presentation for him about our store and include the following: clips of our remodeling projects, sails figures, projected growth potential, and overall team strategies.

Please e-mail me a copy of your first draft one week form today. I will review and return any edits to you with in a few days. I would like to see the presentation in final format by October 15.

I look forward to previewing your draft and am confident that you will demonstrate the efficiency of our store by your presentation. Thanks.

List errors:**FORMATTING****SPELLING/GRAMMAR**

Proofreading for Accuracy

MEMORANDUM

TO: Andrew Jackson, Assistant Manger

FROM: Chad Smith, Manager

DATE: September 18, _____

SUBJECT: PRESENTATION TO ASHLEY GOODE



← Our new district manger, Ashley Good, will be visiting our St. Louis store on Tuesday, September 24. I would like you to prepare a brief presentation for him about our store and include the following: clips of our remodeling projects, sails figures, projected growth potential, and overall team strategies.

← Please e-mail me a copy of your first draft one week form today. I will review and return any edits to you with in a few days. I would like to see the presentation in final format by October 15.

← I look forward to previewing your draft and am confident that you will demonstrate the efficiency of our store by your presentation. Thanks.

rlm

List errors:

FORMATTING

No date
Line of extra space after subject line
Paragraphs indented
No reference initials

SPELLING/GRAMMAR

Manager misspelled twice
Goode misspelled in paragraph
Him should be *her*
Sails should be *sales*
Form should be *from*
With in is one word—*within*

Proofreading for Accuracy

- ◆ Exceeds standard (7–8 total points)
- ◆ Meets standard (5–6 total points)
- ◆ Approaches standard (3–4 total points)
- ◆ Begins standard (2 total points)

	Format/Structure of Document	Use of Proofreader's Marks to Identify and Edit the Document Correctly
4	<ul style="list-style-type: none"> • All formatting errors found. 	<ul style="list-style-type: none"> • All errors identified.
3	<ul style="list-style-type: none"> • Three formatting errors found. 	<ul style="list-style-type: none"> • 5–6 errors identified.
2	<ul style="list-style-type: none"> • Two formatting errors found. 	<ul style="list-style-type: none"> • 3–4 errors identified.
1	<ul style="list-style-type: none"> • One formatting error found. 	<ul style="list-style-type: none"> • 1–2 errors identified.
Score		

CORRECTLY FORMATTED MEMORANDUM

MEMORANDUM

TO: Darla Matthews, Assistant Manager
FROM: Conrad Long, Manager
DATE: (Key in current date.)
SUBJECT: PRESENTATION TO BRENT SMITH

Our new district manager, Brent Smith, will be visiting our Bridgeport store on Tuesday, July 26. I would like you to prepare a brief presentation for him about our store and include the following: clips of our remodeling project, sales figures, projected growth potential, and overall team strategies.

Please e-mail me a copy of your first draft one week from today. I will review and return any edits to you within a few days. I would like to see the presentation in final format within three weeks.

I look forward to previewing your draft and am confident that you will demonstrate the efficiency of our store by your presentation. Thanks.

pyz

CORRECTLY FORMATTED BUSINESS LETTER

August 10, _____

Mr. Gus Triplett
President
Triplett Lumber Company
6789 Hammerhead Way
Lumberton, NJ 12345

Dear Mr. Triplett:

I am excited to learn that you and your associates will be bringing your expertise to the Homebuilder's Expo in March _____. To mark this celebration, you are invited to attend the grand opening of our latest project in Culpepper—Winding Springs Estates. This is our newest and most aggressive project so far.

Winding Springs is a planned community of 450 homes, a golf course, a local shopping complex, an Olympic-size pool, and many other amenities. The total cost for this development is projected at more than \$7.5 million. Because your company has a solid reputation as a leading supplier of hardwood flooring, we hope you will take this opportunity to be our guest and give us your advice on hardwood specifics for our homes. This could be the beginning of a mutually beneficial relationship between Triplett Lumber and Home Builders.

Please consider this invitation and call me at (112) 999-6789. I am available most days between 8:00 a.m. and 5:00 p.m. Again, I look forward to hearing from you and to working with you in the future.

Yours truly,

Leland Forrest
President

mlr

POORLY FORMATTED MEMORANDUM

MEMORANDUM

SUBJECT: Presentation to Orlando Price

TO: Kelly Courage, Assistant Manager

FROM: Lee Smith, Manager

DATE: July 1, _____

Our new district manager, Orlando Price, will be visiting our Bridgeport store on Tuesday, July 26. I would like you to prepare a brief presentation for him about our store and include the following: clips of our remodeling project, sales figures, projected growth potential, and overall team strategies.

Please e-mail me a copy of your first draft one week from today. I will review and return any edits to you within a few days. I would like to see the presentation in final format by July 15.

I look forward to previewing your draft and am confident that you will demonstrate the efficiency of our store by your presentation. Thanks.

kra

POORLY FORMATTED BUSINESS LETTER

August 10, _____

Mr. Gus Triplett,
President,
Triplett Lumber Company,
6789 Hammerhead Way,
Lumberton, NJ 12345

Dear Mr. Triplett

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Winding Springs is a planned community of 450 homes, a golf course, a local shopping complex, an Olympic-size pool, and many other amenities. The total cost for this development is projected at more than \$7.5 million. Because your company has a solid reputation as a leading supplier of hardwood flooring, we hope you will take this opportunity to be our guest and give us your advice on hardwood specifics for our homes. This could be the beginning of a mutually beneficial relationship between Triplett Lumber and Home Builders.

Please consider this invitation and call me at (112) 999-6789. I am available most days between 8:00 a.m. and 5:00 p.m. Again, I look forward to hearing from you and working with you in the future.

Fondly

Leland Forrest
President