

Communicating in Writing

Communicating in Writing is for anyone who needs to write letters, reports, proposals or e-mail messages in a professional way. Excellent writing can be difficult, particularly if the subject is complex or contains technical information. This program offers a step-by-step method for preparing, composing and refining written communication.

Business people judge our professionalism, competence and even our intelligence by the written documents we deliver to them. If they are organized, clear, concise, and professionally composed then they are likely to take the information more seriously than if the document is disorganized, unclear, rambling and unattractive. Excellent communication establishes a standard of professionalism that business people take seriously.

No doubt there is work involved in any form of excellence: Our method for communicating in writing will help you to eliminate duplicative steps and have you working on activities that lead directly to excellent workmanship in document planning, construction, refinement and delivery.

Pete Fowler is active as a California General Contractor, Certified Professional Cost Estimator, Certified Inspector, Construction Consultant, author and speaker regarding construction topics. Focusing on construction projects and buildings suffering distress, Mr. Fowler has analyzed damage, performed testing, specified and overseen repairs, performed repairs as a contractor and testified on a variety of construction issues.

Outline

I. *Introduction*

- Who Are We?
- Why Are We Here?
- Writing Is Work

II. *What's the Point?*

- *Delivering Professional Solutions*
- Communication of Complex Information
- Forest vs. Trees / Big Picture vs. Details
- Analogy: Internet Home Page
- Don't Get Lost in the Details
- Overcome Fears
- Make Lots of Passes

III. *How To Write by Meyer & Meyer*

1.0 Preparation & Organization

- 1.1 Choose your format
- 1.2 Identify your points
- 1.3 Collect data regarding the points

2.0 First Draft

- 2.1 Compose your theme (Introduction)
- 2.2 Draft your outline (from the points identified in 1.2)
- 2.3 Write first draft

3.0 Polishing (make multiple passes to improve the previous draft): be accurate, be precise, be consistent, be brief, be fair, keep a steady depth, keep a steady tone, use an established layout (corporate look & feel), and use good grammar.

IV. *Prepare*

- Choose Your Format
- Write the first pass on "Why We Are Here"
- Brainstorm Your Points
- Research and Compile Information

V. *Draft*

- Write the Introduction
- Outline the Complete Work from Beginning to End (A to Z)
- Re-Organize the Outlined Information
- Write the First Draft

VI. *Work*

- Write Or Refine The Executive Summary & Introduction
- Identify Recommendations or Action Items, If Necessary
- Read the First Draft Completely Through and Update (Create Draft #2)
- Read Draft #2 and Update (Create Draft #3)
- Have Someone Else Read Draft #3 and Ask Questions
- Repeat the Reading and Updating As Necessary
- Deliver: Media? Who Gets It? How Do You Confirm and Document Delivery?

I. Introduction

Who Are We?

Pete Fowler Construction Services, Inc. (PFCS) is a professional construction services provider. *We deliver professional solutions for building problems.* Our services include expert construction consulting, inspection and testing, estimating, management, training, and testimony. Our team of construction professionals uses our unique, proven systems to deliver the most accurate and comprehensive solutions to best serve the interests of our clients, while maintaining our unwavering professional integrity. PFCS often serves as the interpreter of technical data related to buildings and the processes of construction. We create information that technical and non-technical professionals can understand and use to make informed, intelligent decisions.

PFCS is very special: There are few companies that can solve the problems we solve at a reasonable price. Continuously improving service delivery is being infused into the company DNA, and every important activity (i.e. business process) is being documented in our company organizational system.

Why Are We Here?

We are in the communication business. As already stated, “We create information that technical and non-technical professionals can understand and use to make informed, intelligent decisions.” This means taking a complex data set, organizing and analyzing it to create information, and finally summarizing the information in a way that non-technical **people can understand and use.**

We are here to learn to communicate in writing. Writing can be learned. If we are “knowledge workers” or professionals in any field, bad writing is “bad workmanship”. A professional who cannot communicate well in writing, is like a carpenter who cannot cut straight. On the other hand, you can make up for many shortcomings by consistently working through the process of writing until your written documents are excellent. If you deliver excellent written work consistently, you are more likely to be regarded highly in your field.

Writing Is Work

Naturally, if you are writing a one-page document, the steps to completion will go quickly. But remember, they are always the same steps.

If you like working toward the creation of excellence and elegance, then you will like the writing process (eventually). If you don't, then you won't. Writing well in business is not a matter of artistry; it is a matter of skill. Skills are won through practice. I don't know of any other way to develop a skill. The first time you compose an excellent piece of writing it will take you 5 to 10 times longer than "normal". The second time it will take you 2 to 5 times longer. The third time it will take twice as long. Some time between the fourth and 50th time you compose an excellent piece of writing it will take you the "normal" amount of time. This is how life works. If you don't like the idea that practice makes perfect, take a number. We are all frustrated by it, but once you are past the learning phase, your capacity as a professional will have been elevated into another league.

II. What's the Point?

Delivering Professional Solutions

Solutions: A “solution” is a process that can move a situation from an undesirable state to the best available alternative. Merriam-Webster defines solution as: 1: an action or process of solving a problem; 2: an answer to a problem; 3: a set of values of the variables that satisfies an equation; 4: a disentanglement of any intricate problem. We need to decide the scope of the solution we will be addressing in each of our pieces of written work.

Professional: Professionalism is the effective, proficient and courteous handling of the activities involved in your work. Merriam-Webster defines professionalism as: “Exhibiting a courteous, conscientious, and generally businesslike manner in the workplace.” We need to decide what about our written work will be required to consider it “professional”. In their book *How To Write*, Meyer and Meyer suggest: be accurate, be precise, be consistent, be brief, be fair, keep a steady depth, keep a steady tone, use an established layout (PFCS corporate look & feel), and use good grammar. I agree with the Meyer’s sentiments completely.

Delivering: We need to think of the term “deliver” in 2 distinct ways: (1.) physical “Deliverables” such as documents, e-mail messages, spreadsheets, plans, Power Point Presentations, etc... and (2.) the style of our “*Delivery*”. In this training session we are dealing with both the creation of a “Deliverable” document, and the style of “delivery” that will give the recipient cause to hold you and your work in high esteem. We need to decide what our delivery of these deliverables is going to say about us, about our competence, our work ethic and our dedication to excellence.

Communication of Complex Information

Remember that any complex or voluminous set of information (including the American Civil War) can be presented in various forms and lengths:

- The Civil War can be described (summarized) in 1 paragraph. For example (113 words):

The U.S. was founded in 1776 and was divided socially and economically in the years prior to Abraham Lincoln's 1860 presidential victory, particularly by the issue of slavery that was practiced in the agricultural Southern states but not in the industrialized Northern states. Early in 1861 the South separated from the Union, set up a government, Lincoln was inaugurated as President, and hostilities broke out, as the North was determined to hold the Union together at any cost. By the end of 1865 the South had surrendered and slavery was abolished by the 13th amendment to the US Constitution. The combined death toll was greater than 500,000 and over 400,000 troops were wounded.

- The Civil War can be described in an article.
- The Civil War can be depicted in a 2-hour movie (there are many).
- The Civil War can be depicted in a multi-episode documentary (on PBS and others)
- The Civil War can be depicted in a book (there are many).
- The Civil War can be depicted in a series of books (there are many).
- The Civil War can be studied as a life-long pursuit (there are many scholars).

When communicating complicated subject matter, remember: If you can't summarize your point in a paragraph or two, then you have not worked hard enough on it. When a subject large enough to fill a lifetime of study can be summarized into one paragraph, any thing can. I don't mean to suggest that a tremendous amount of detail can be transmitted in a paragraph; but the mind of a layperson needs constant orientation. By summarizing your material for orientation, then diving into the supporting details as necessary, you will more effectively **communicate**.

Forest vs. Trees / Big Picture vs. Details

The trees are only important in the discussion when we understand what forest we are in. Don't talk about trees until you have told the reader what forest you are in. This is a big problem that causes a lot of problems.

Both the big picture and the details are important. We each need to recognize which we grasp and communicate better. Some people are naturally oriented to big picture concepts and some dig into details. Whichever you are, a big picture or details person, you will need to address the one you are weak at. If you do, your written communications are much more likely to be universally accepted as excellent work. Don't forget this, and don't forget where your strengths are so you can address your weakness.

Analogy: Internet Home Page

Think of an elegantly designed internet home page. It is easy to understand the scope of the entire site from a good home page. You can understand the navigational scheme when they are well designed. Information is organized logically and when you click around you find what you would expect to find. A good document covering a complex subject will operate much the same way. You need to be concise enough to get your point across, but also support your conclusions with evidence and references to further information, if necessary.

Don't Get Lost in the Details

Getting lost in the details is a horrible sin. It wastes your time, and worse, it wastes the time of the reader.

Overcome Fears

Many of us are afraid to do things badly. I admit it; I don't like it when I am not good at some thing. Excellent writing ability, as we have said, is a skill that comes with practice. Good writers do a lot of writing.

Using this step-by-step process will help. Do not try to short-cut the process by writing in one pass. Writing that will make you stand out as a top-notch professional will take time and energy, but you will succeed. Let your steps be small ones and celebrate when you get to each of the milestones. If you are working on a computer, consider printing drafts at key milestones and savoring the victory of completing these steps.

Make Lots of Passes

As you will see in the step-by-step list of activities below, excellent writing requires work. This work must be made in passes. Run through the entirety of the work from A through Z many times. This is in contrast to the philosophy of spending the time in trying to make some thing perfect on the first pass. It is my hard-won experience that trying to make it right on the first pass gets you "lost in the forest", because you are concentrating on "trees" rather than the big picture. Passing across the work from A to Z as rapidly as possible ensures that you always have perspective on the entire body of the work.

III. How To Write by Meyer & Meyer

1.0 Preparation & Organization

- 1.1 Choose your format
- 1.2 Identify your points
- 1.3 Collect data regarding the points

2.0 First Draft

- 2.1 Compose your theme (Introduction)
- 2.2 Draft your outline (from the points identified in 1.2)
- 2.3 Write first draft

3.0 Polishing (make multiple passes to improve the previous draft)

- 3.1 Be accurate
- 3.2 Be precise
- 3.3 Be consistent
- 3.4 Be brief
- 3.5 Be Fair
- 3.6 Keep a steady depth
- 3.7 Keep a steady tone
- 3.8 Use an established layout (corporate look & feel)
- 3.9 Use good grammar

This is a great book. It is available from Barnes & Noble (www.barnesandnoble.com) for \$5.00.

Summary: Writing is critical. Writing is a process. The writing process is always the same 3 steps (organize, draft, polish). Don't try to do step 2 until you have completed step 1. Some of the steps in writing involve not writing. Figuring out the theme (in a few short sentences) is a critical step and might require some time. Writing takes tenacity. We are entitled to our own opinions but not our own facts. Be clear and concise and cut unnecessary stuff. Use an established layout. Read the work out loud to check for grammar. If there is time, always review the work one more time. Communicating your intended meaning to the reader is the most important thing.

IV. Prepare

Choose Your Format

Most business related writing should rely on a standard format. Our company has a “corporate look & feel” for all document types, including reports, proposals, letters, faxes, and e-mail messages, to which we adhere. All written documents can all be formatted according to some standard; I recommend you establish a standard and stick with it.

Make sure you use headings, sub-headings, numbered lists, bullet-point lists, bold letters and other identifiers to aid the reader in breaking up a longer work into bite size chunks.

For PFCS, there is no reason to reinvent a format. For each of our services we have a standard set of example “deliverables” to choose from as a format. These Include:

- CC: Report, Summary of Issues, Opinion Letter
- PA: Residential Property Assessment, Commercial Property Assessment, Testing Summary and Analysis
- CE: Preliminary Estimate (Plaintiff by Residence), Preliminary Estimate (Defense by Issue), New Construction (by CSI), Budget, Budget / Payment Application
- CM: Proposal for CM Services, Letters, Prime Contracts, Subcontracts, RFI, Meeting Notes
- TE: Presentation Materials
- EW: Opinion Letter

Write the first pass on “Why We Are Here”

This is like the “Vision Statement” in project planning. It might be one sentence or it might take a paragraph. Remember, if you would like the audience to take some action, be sure it is clear what your recommendations are.

For example:

- This report will (1.) give a basic description of the property, (2.) list the problems identified by the owner and those we found during our 1-day of inspection, and (3.) outline the steps we feel need to be taken to resolve the problems.
- This correspondence is to explain our position related to the denial of the request for payment by the roofing contractor, due to components having been defectively installed, and the steps required for the roofer to receive complete final payment.
- This memo is a response to a letter from the owner alleging project delays, identifying additional expenses, and assigning 100% of the blame to the contractor. The correspondence will include two step-by-step scenarios for project close-out.
- This e-mail message serves as a request for proposal (RFP) to a drywall contractor for a new single-family home construction and will identify the location, basic scope of work, exclusions, insurance requirements, and payment information. In addition, I will include our contact information and information for how plans can be procured.

Once this activity is complete, you can judge the content of your writing to ensure it is supporting the purpose of the work.

Brainstorm Your Points

What are the key points you want to make? This is not the time to make detailed supporting documentation of each point, so don't let yourself get too detail oriented here.

For example, the points for the first bullet point in the list above might be:

- Property Description: Single Family Residence in San Juan Capistrano
- Problems: Leaking Doors (2 sets), Leaking Roof (3 locations), Damaged Flooring (2 locations), electrical problems (3 locations), water in fireplace during storm, etc...
- Steps to Resolution: Testing, report, Scope of Work, budget, RFP, contract, perform repairs, test repairs.

Research and Compile Information

This is where you hit the phones, the internet, the books, your colleagues, or any other source of information necessary to get your thoughts together.

Examples of research in our current sample situation might be to compile some articles on weather-stripping and painting for the deteriorated French doors, and flush-mounted vinyl sliding glass doors for the leakage at the sliding doors upstairs.

V. Draft

Write the Introduction

This is where you finally get to do some writing. Review the following example:

The property involved is a single-family semi-custom residence constructed in approximately 1980 and located at the above noted address in San Juan Capistrano, CA. The home is now owner-occupied. The current owners purchased the residence in November 1998, did not have a residential home inspection performed, do not know the circumstances of original construction, nor do they possess construction drawings from the time of construction. As-Built drawings are available in various formats (including PDF).

PFCS has had one on-site meeting with the owner and performed a visual inspection 1/10/05. We were contacted due to leakage and site ponding, caused by the recent rains, to perform a visual only inspection, interview the owners, compose a summary of our observations and deliver recommendations to repair problems with the property.

This is where you want to include the “who, what, where, when, and why” of the current situation. Any basic information that is left out here can cause the reader confusion.

Here is another example:

We are requesting proposals for performance of all drywall (gypsum wallboard) work on a new single-family semi-custom home in San Clemente, CA. The proposal needs to include all drywall work for a complete job, with a smooth coat finish achieving the highest standards (GA-214-96 Level 5) for quality as specified by the Gypsum Association (www.gypsum.org/download.html). Payments will be distributed every other week on standard payment application forms. \$500,000 Commercial General Liability (CGL) insurance policy and references required to bid. Plans can be viewed at 927 Calle Negocio, Suite G, San Clemente, CA 92673. Telephone 949-240-9971.

Outline the Complete Work from Beginning to End (A to Z)

Before writing any further, now figure out the complete contents of your document. Keep in mind the introduction that you just wrote, as well as the “Why Are We Here” section.

For example:

- Executive Summary
- Introduction / Why Are We Here?
 - Called by owner
 - Investigate water intrusion and ponding
 - Offer recommendations
- Property Description
 - Single Family Residence
 - In San Juan Capistrano
 - Constructed approximately 1980
 - Approximately 3,200 square feet
 - Slab on grade construction

- Wood frame, siding & stucco,
- Aluminum windows except 2 vinyl replacement windows at 2nd floor master bedroom
- Wood shake steep slope on front and cap sheet low slope roof at back
- Problems
 - Leaking Doors (1 set and one slider)
 - Deteriorated Doors (2 sets)
 - Leaking Roof (3 locations)
 - Damaged Flooring (2 locations)
 - Electrical problems (3 locations)
 - Water in fireplace during storm
 - Drainage problems (4 locations)
 - Clogged sub-grade drain system
- Steps to Resolution
 - Testing
 - Report
 - Scope of Work
 - Budget
 - RFPs
 - Contract
 - Perform repairs
 - Test repairs

Re-Organize the Outlined Information

This is a key activity. Beyond this point, structural changes get complicated. You might want to print the document and take a red pen to it. You might want to review it with some one to make sure the information flows as you would like it; you may be surprised at what comes out of your mouth when trying to tell the story from the first pass of your outline.

Write the First Draft

This is where the work begins; and it should go fast, considering all of the work you have done to prepare.

This is where people who don't write so well begin. Don't follow their bad example.

When you are done, you might consider printing and reviewing the document with a red pen in hand.

If the document is large and complex, you will probably want to make this first draft what I call the "Stream of Consciousness" pass. In this draft do not try to put any REALLY detailed information. Don't stop typing until all of the information that is in your mind has been typed onto the pages of the report. The next pass can be the one where the calculations and detailed information is updated.

VI. Work

Write or Refine the Executive Summary & Introduction

What are the important points of your work? And don't say "all of them". Remember back to the American Civil War discussion; some people want or need a brief synopsis – so give it to them. If the document is only a couple of pages long, then this can be omitted, but if it gets beyond 4 pages, then you definitely need an Executive Summary, or some section which serves the same purpose at or near the top of the document.

Identify Recommendations or Action Items, If Necessary

If you want action, you have to ask. If some of the actions in the recommendations section are required by you or your organization, make sure that you do them.

Read the First Draft Completely Through and Update (Create Draft #2)

I usually print mine and go through them with a red pen. It is usually a blood bath. This is the activity that separates lucid and effective writers from the rest of the pack.

Read Draft #2 and Update (Create Draft #3)

Again, I usually print mine and go through them with a red pen. This time, there is more satisfaction because I am just polishing. The document starts to look very professional.

Have Someone Else Read Draft #3 and Ask Questions

This is a luxury, of course. But, if this document is important, it is worth the work.

Repeat the Reading and Updating As Necessary

This is going the extra mile. When it counts, do it.

Deliver: Media? Who Gets It? How Do You Confirm and Document Delivery?

How are you going to send this? I hate to see beautiful documents or reports that contain photographs sent via facsimile. They look worse for the wear, when we now usually have the option of printing them to an electronic format like PDF (portable document format) and sending them electronically via e-mail.

In our office it is critical that all written communication that comes in or leaves the office is documented in the project file. We need to know who created it, when it went out, who it went to, and sometimes we need to confirm receipt. There are lots of ways to do this, but making sure it gets done can be crucial.

VII. Practice

A. Prepare

- Choose Your Format
- Write the first pass on “Why We Are Here”
- Brainstorm Your Points
- Research and Compile Information

B. Draft

- Write the Introduction
- Outline the Complete Work from Beginning to End (A to Z)
- Re-Organize the Outlined Information
- Write the First Draft

C. Work

- Write Or Refine The Executive Summary & Introduction
- Identify Recommendations or Action Items, If Necessary
- Read the First Draft Completely Through and Update (Create Draft #2)
- Read Draft #2 and Update (Create Draft #3)
- Have Someone Else Read Draft #3 and Ask Questions
- Repeat the Reading and Updating As Necessary
- Deliver: Media? Who Gets It? How Do You Confirm and Document Delivery?

Back-Up / References / Sources of Information

#	Name	Contact Information
1	VII. Practice - Blank page 1: Prepare	
2	VII. Practice - Blank page 2: Draft	
3	VII. Practice - Blank page 3: Outline	
4	VII. Practice - Blank page 4: First Draft	
5	VII. Practice - Blank page 5: Refine	
6	How To Write by Meyer & Meyer	www.barnesandnoble.com
7	We Shall Not Fail: Chapter 3 by Sandys & Littman	
8	Introduction to Business Communications – 1 Hour Video	DVD in physical library
9	PFCS Presentation Development Method	Library under Training & Education
10	5C 04-12-21 Cost Review.pdf	PFCS Project File (Wakeham 04-157)
11	5E Executive Summary 03-03-28.pdf	PFCS Project File (Geller 01-164)
12	5C Report of Testing Results 04-06-10.pdf	00-000 Sample Property Project PA
13	11 1A 03-12-09 L to ATY RE Investigation.pdf	00-000 Sample Consulting Project CC
14	11 1A 03-10-14 L to ATY re Observations.doc	00-000 Sample Consulting Project CC
15	03 1A 03-09-10 L to ATY RE Investigation Proposal.doc	00-000 Sample Consulting Project CC