

## **Unit 318 (B&A 57): Principles of business communications and information**

### **Handout 2: Document design**

## **Different types of document**

- Letters, correspondence
- Reports, proposals
- Minutes, agendas
- Forms/invoices
- Newsletters, brochures, leaflets
- Posters, notices

## Software for document design

- Word processing
- Desktop publishing
- PowerPoint



## Letters

Must be clearly structured with the detail of whom it is for, the date and the content well presented.

A well-structured letter requires:

- an introduction
- main content
- summary.

‘House style’ sets out the layout and style of documents, the font size and style to be used and the stationery and templates.

## Example letter

<p><b>ABC Supplies</b> 70 Regent Street, Hitchin, Herts 01462 939399</p>	
Reference RD/FRT	← Very often initials of dictator/typist or a file number, etc. forms the reference.
<p>14 November 2000</p>	
<p>Mr E F Taylor Sales Manager Thomkins &amp; Greenaway &amp; Co Ltd Greenacre Industrial Estate PETERBOROUGH PE4 9XR</p>	
Dear Mr Taylor	← This is the <b>salutation</b> . Use Dear Sirs when writing to a firm, or Dear Sir when writing to an unknown person. The complimentary close will change to Yours faithfully.
<p>Thank you for your letter of last week.</p> <p>As advised to you earlier, we have been hampered by the recent postal strikes. Please be assured that you will be informed just as soon as the items are available for collection.</p> <p>I hope to be in touch with you again by the end of next week.</p>	
Yours sincerely	← This is <b>the complimentary close</b> . A much larger space is needed after this so that Mr Williams can sign his name. Normally the typist presses Enter 5 or 6 times.
<p>John Williams</p>	

## **Memos**

Internal documents that are sent to one or more members of staff.

Some staff are direct recipients of the correspondence while some are copied in.

Some memos are very formal.

Shorter, more informal notes are gradually being replaced by email.

There is no need to sign a memo.

## Example of memo layout

### MEMORANDUM

To	Sally Dobson	From	Steven Carter
Date	5 December 2008	Ref	JC/ie

#### VISIT TO CHINA

Confirming the dates of the China trip as 8–15 October.

## **Reports and proposals**

Reports for sales, progress, performance.

Proposals for projects, business plans, spending.

Reports will be on a particular subject and the content will need to be researched thoroughly.

Requires clear structuring with the purpose and summary of the content at the beginning.

The content needs to be clear and easy to follow – good use of bullets, headings.

All references and sources of information should be noted.



## Report structure

Title page	The title of the report with the name of the person who wrote it and the date.
Contents page	Not necessary if the report is short; useful to list the paragraph headings and the pages on which they appear if report is long.
Terms of reference	Gives the background to the report – why it was written and what it is about, eg <i>To report on filing equipment as requested by S Jones, Manager on (date).</i>
Procedures	Explanation of the steps taken to gather the information.
Findings	Make sure your report progresses logically from one point to the next, with headings for each section.
Conclusion	Sum up the findings of the report.
Recommendation	On the basis of the information in Findings and Conclusion, make recommendations for action (or perhaps for no action).

## Example report layout

Include Company name and a clear title	THE EXCELSIOR HOTEL	
	REPORT ON VISITOR SATISFACTION	
State why you are writing the report and who asked you for it (Terms of Reference). Also list the steps taken to gather the information (Procedures)	INTRODUCTION	
<p>These are the Findings. Use sub-headings to classify the information logically.</p> <p>Use numbered points consistently.</p> <p>Remember to state only the facts.</p>	1	STANDARD OF SERVICE
	1.1	
	1.2	
	2	FACILITIES
	2.1	
	2.2	
	3	RESTAURANTS
	3.1	
	3.2	
	State the logical implications of the Findings.	CONCLUSIONS
Make recommendations (if requested).	RECOMMENDATIONS	
	1	
	2	
Don't forget to add this closing section.	Name	
	Title	
	Reference	
	Date	

## Forms

Tables can be used in word processing to make effective forms.

Most word-processing software has the facility to add check boxes and drop-down boxes for completing online.

Check space is adequate for intended information.

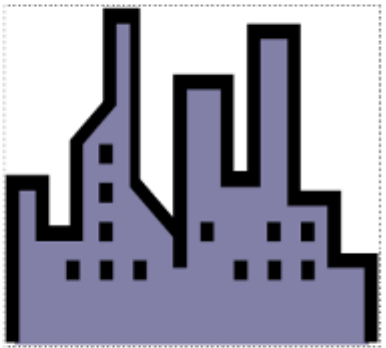
End use – online or printed copy?

INVOICE		
To:	Date:	Invoice No:
Description		Cost £

## Brochures, leaflets, newsletters

- Number of columns
- Integration of graphics
- Contents table
- Fonts and heading sizes

Business Name	Volume 1, Issue 1
NEWSLETTER	Newsletter Date

<p><b>INSIDE THIS ISSUE:</b></p> <table border="1"> <tr><td>Inside Story</td><td>2</td></tr> <tr><td>Inside Story</td><td>2</td></tr> <tr><td>Inside Story</td><td>2</td></tr> <tr><td>Inside Story</td><td>3</td></tr> <tr><td>Inside Story</td><td>4</td></tr> <tr><td>Inside Story</td><td>5</td></tr> <tr><td>Inside Story</td><td>6</td></tr> </table>	Inside Story	2	Inside Story	2	Inside Story	2	Inside Story	3	Inside Story	4	Inside Story	5	Inside Story	6	<p><b>LEAD STORY HEADLINE</b></p> <p>This story can fit 175-225 words.</p> <p>The purpose of a newsletter is to provide specialized information to a targeted audience. Newsletters can be a great way to market your product or service, and also create credibility and build your organization's identity among peers, members, employees, or vendors.</p> <p>First, determine the audience of the newsletter. This could be anyone who might benefit from the information it contains, for example, employees or people interested in purchasing a product or requesting your service.</p> <p>You can compile a mailing list from business reply cards, customer information sheets, business cards col-</p>	 <p>spend on your newsletter. These factors will help deter-</p>
Inside Story	2															
Inside Story	2															
Inside Story	2															
Inside Story	3															
Inside Story	4															
Inside Story	5															
Inside Story	6															

## Itineraries

- Itemise details of a trip, eg dates, destination and names of those involved.
- Arrangements are listed in date and time order.
- The 24-hour clock is used for times.

ITINERARY FOR MISS NAOMI LISHMAN  
VISIT TO MUNICH  
4 – 6 March 2011

*Monday 4 March*

0600      Company car from home to Manchester airport  
0645      Check-in for flight BA398 to Munich  
0745      Departure of flight  
1045      Arrive Munich – to be met by Herr Schumacher,  
German rep  
            Accommodation booked at Hotel Excelsior, Marie Therese  
            Strasse, Munich  
            Tel (0049) 89 20 38 29 / Fax (0049) 89 34 28 73

*Wednesday 6 March*

1600      Depart Munich office for airport (taxi)  
1715      Check-in for flight LH281 to Manchester  
1815      Departure of flight  
1915      Arrive Manchester – to be met by company car  
for journey home.

# Agendas

## **Health and Safety Committee Meeting 31 March 2014 at 3.00 pm in Conference Room 1**

### **AGENDA**

- 1 Apologies for Absence
- 2 Minutes of last meeting
- 3 Matters arising from last meeting
- 4 Fire extinguishers
- 5 New hazardous substance regulations
- 6 Floor covering in upper corridor
- 7 Any other business
- 8 Date and time of next meeting

standard items

standard items

# Minutes

- Heading
- Details attendance
- Follows agenda
- Numbered points

**MINUTES OF THE HEALTH AND SAFETY COMMITTEE MEETING  
HELD ON 31 MARCH 2014 AT 3.00 PM IN CONFERENCE ROOM 1**

Present: John Howes, Chair  
Leslie Simper, Secretary  
  
Peter Vine  
Jag Slater  
Pritti Patel  
Precious Ndobne

**1 Apologies for Absence**

There were no apologies for absence.

**2 Minutes of last meeting**

These were signed as correct.

**3 Matters arising from last meeting**

3.1 Fire drill – rescheduled for 10 April.

**4 Fire Extinguishers**

4.1 PV stated that the annual check had gone ahead correctly.

4.2 Replacement extinguishers on upper site: two extinguishers had had to be replaced.

## **Design checklist**

- ✓ Accurate text
- ✓ All content included
- ✓ Page numbering/headers/indices
- ✓ Graphics and illustrations
- ✓ References
- ✓ Page breaks