

Writing with Clarity

Email and Document Formatting Guidelines



Have you ever done this to a reader?

The deferral option can provide you with significant flexibility in timing the receipt of taxable income and the opportunity of saving for retirement through the investment of pre-tax dollars, and the resulting accumulation of earnings on a tax-deferred basis.

If the answer is yes, it is time to put your reader first. The following guidelines will help you format clear and concise emails and documents that do what you want them to do.

Guideline	Guideline Processes
<p>Format messages and documents, so readers can</p> <ul style="list-style-type: none"> ➤ organize ➤ skip ➤ scan ➤ retrieve information (in 3 seconds.) <p>Group information into manageable chunks of 7 + or – 2. This example has 3 chunks.</p>	<p>NOTE THE FOLLOWING:</p> <ul style="list-style-type: none"> ➤ Information is buried in the unformatted sample below. ➤ Long, complicate sentences obscure the message. <div style="border: 1px solid black; padding: 5px; margin: 10px 0;"> <p>Please assist us by submitting your updates regarding claims processing so we may achieve timely execution in processing claims. These records must be updated by licensed personnel only and should be in our office by 3:00 on March 5. Please reply immediately to inform us of receipt of this memo and your willingness to comply with this request.</p> </div> <p>NOTE: In the example below, the sentences are still too long and complicated, but chunking alone adds clarity.</p> <div style="border: 1px solid black; padding: 5px; margin: 10px 0;"> <p>Please assist us by submitting your updates regarding claims processing so we may achieve timely execution in processing claims.</p> <p>These records must be updated by licensed personnel only and should be in our office by 3:00 on March 5.</p> <p>Please reply immediately to inform us of receipt of this memo and your willingness to comply with this request.</p> </div>

Format Messages, cont.

Provide a label for each chunk.



Use bold and color for emphasis, but use them sparingly.



NOTE: With labels, the complicated sentences are now manageable chunks.

We need your help. It is time to submit your updates for processing claims. The following instructions will help us meet our deadline.

Special Instructions: Only licensed personnel can update records.
Due Date: 3:00 PM, March 5
Send to: Jordan Neft, Insurance, MS 203
Action Requested: Please let us know you received this message by replying with the subject line: **Will Do.**
Questions? Call Marcia at **X 3250.**
Thanks for your help!

NOTE: For short messages, you may need only to double space between each sentence to achieve a formatted message.

We need your help!
Please submit your updates for processing claims to **Jordan Neft, Insurance, MS 2003**, before 3:00 PM on March 5.
Remember, only licensed personnel can update records.
Questions? **Call Marcia at X 3250.**
Thanks for your help!

Move from This

To Whom it May Concern:

Mr. Doe has been continuously employed with Kappa Services, Inc. since October, 1987. His responsibilities include the operation and maintenance of all engine room machinery and deck equipment.

Mr. Doe has been subject to random drug testing for at least 60 days.

If you have further questions, please call me at 206-321-4545.

to This

To Whom It May Concern:
The following verifies John Doe's employment at Kappa Services.

Hire Date	October, 1987
Current Position	Chief Engineer
Responsibilities	Operations, maintenance, including <ul style="list-style-type: none">• Tow winches• Anchor windlasses
Drug Testing	Mr. Doe has been subject to random drug testing for at least 60 days.

If you have further questions, please call me at 206-321-4545.



Format messages, cont.

Which of the messages below would you rather see in your inbox? Which ones would you most likely read and respond to quickly?

X

Alex, I have some questions about the OSHA visit. How long do they plan on being here? Do you know how many people they're sending and how many guys do we need to have on hand for the walk-through? Also, do we need to do any pre-work? Are they scheduling a specific time, or do they just drop in? What do you want us to have ready at our end?

Use bulleted or numbered lists when possible.



Alex, I have 5 questions about the OSHA visit:

1. How long will they be here?
2. How many people can we expect?
3. How many people do I need to dedicate for the walk-through?
4. Is it a scheduled visit? If so, when?
5. What can we do to prepare for the visit?

(NOTE: Alex can now answer each question within the message or refer to a question by its number.)

Adopt a positive tone.

X

It's very important that we are in compliance in all categories since we failed three during the last OSHA visit. We need to be sure the WARNING signs are posted clearly in each area. Make sure all areas are dry. We had standing water in A and C corridors last year. Everyone should wear all safety equipment, including goggles and earplugs. Basically, we need to do what we always do, but if you see anything that could cause a problem, fix it.

Notice the improved tone and clarity in this message.



Let's work together to achieve 100% compliance with this year's OSHA visit. I ask each one of you to make sure of the following:

- All **WARNING** signs are posted prominently in all areas.
- All areas are clear and dry, especially in A and C corridors where we had standing water last year.
- Everyone is wearing all safety equipment, including goggles and earplugs.

With your help, we'll earn a perfect score. THANKS!

<p>Use simple language.</p> <p>Avoid passive voice, nominalization, and jargon (shown in red.)</p>	<p>The more complicated or dense your information is, the simpler and clearer your language must be.</p> <p>Use short clear sentences with subject/verb format. Put the subject at the beginning of the sentence and the verb after the subject.</p> <p>Unclear: Please assist us by sending your suggestions for timely execution of claims processing.</p> <p>Clear: We need your help. Please send us your suggestions for processing claims.</p> <p>Unclear: We are in receipt of your proposal and have conducted the inventory as per your instruction. You will be contacted by our legal department as of August 9.</p> <p>Clear: We received your proposal and conducted the inventory as you instructed. Our legal department will call you by August 9.</p>				
<p>Make the subject line specific.</p>	<p>Make the subject line specific, so people know exactly why they are receiving your message. It's the first question they ask.</p> <p>General – Finance Report Specific – Finance Report – March Due Dates</p> <p>General – Audit Report Specific – Accounting's Third Quarter Audit Report</p> <p>General – Safety Report Specific – Assignments for November's Safety Report</p> <p>NOTE: Repeat subject in the body of the message. Not everyone read's the subject line.</p>				
<p>Example Rewrite (See beginning of packet.)</p> <p>Use If/Then statements to clarify dense information.</p>	<p>Here is the rewrite for the introductory sample.</p> <table border="1" data-bbox="467 1457 1382 1724"> <thead> <tr> <th data-bbox="467 1457 727 1493">If</th> <th data-bbox="727 1457 1382 1493">Then</th> </tr> </thead> <tbody> <tr> <td data-bbox="467 1493 727 1724">You select the deferral option</td> <td data-bbox="727 1493 1382 1724"> You will be able to <ul style="list-style-type: none"> ➤ Choose when to receive your taxable income. ➤ Save for retirement by investing your pre-tax dollars. ➤ Accumulate earnings on a tax-deferred basis. </td> </tr> </tbody> </table>	If	Then	You select the deferral option	You will be able to <ul style="list-style-type: none"> ➤ Choose when to receive your taxable income. ➤ Save for retirement by investing your pre-tax dollars. ➤ Accumulate earnings on a tax-deferred basis.
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