DATE: January 5, 2015

TO: Business Communications Students

FROM: Karen Lamoreux kfl

SUBJECT: INITIAL SELF-ASSESSMENT MEMO INSTRUCTIONS

Write a **one**-page (no longer), TRUE single-spacing (0 before, 0 after, and single-see page **3** for details), 10-12 pt. easily readable font (Arial, Calibri) *Initial Self-Assessment Memo* to me. The memo should describe your assessment of your **current communication skill level, *areas*** that you would like to **improve,** and **course** ***components*** (text, assignments, *Lamoreux Laws*, and report topic) that you think might **contribute** to yourimprovement **goals**.

**GENERAL FORMATTING**:

* **Manually** set up the memo format, left-aligned Business Block Style. See above formatting and page **4:** *How to Format a Memo*. **DON'T** use a "memo template" from WORD or other program. Follow the Memorandum format example in this Packet and on **textbook** **page 212**. Also see **page 211, *Professional E-mail and Memos Checklist***, andview the *Preparing for Assignments PowerPoint* in Week 02 Module.
* As with all business messages, your ISAM must have **introduction, body,** and **closing** sections.
* In the **body**, you MUST use a **numbered list** that matches(“mirrors”)the **requested numbered items**. Business messages often use lists to organize information because they save time for busy readers! **Introduce** your **numbered list** with an **Independent Clause**, followed by a **colon**. Review **Colon Use** information in the **Spelling & Grammar Review Packet** and *Grammar Foundation PowerPoint* in Week 02 Moduleand in the textbook **Appendix A, Guides 27-30**.
* **Don’t** include the questions; just answer the questions in complete sentences in your list.
* If your memo is shorter than ¾ page, you missed something! If it's longer than 1 page, you MUST cut the fat and filler! Trust me: hundreds of students before you were able to keep this to one page effectively, and you can, too. ☺

**PREWRITING PHASE**:

1. Complete **Chapter 1's Activity 1.3 (**textbook, **pages 32-33**): *"Communication Skills Assessment: How Do You Stack Up?"* Total your scores and read the interpretation (**page 33**). (See Week 02 Page/Module for ISAM materials.)
2. Re-read the ***Syllabus****,* including the *Puget Sound Employers’ Quote* (Week 00 and 01 Pages/Modules)
3. Read the ***Lamoreux's Laws****: Advice/Tips for Student Success* Packet (Week 02 Page/Module).

**WRITING**:

***INTRODUCTION***: Begin with an "*authorization*" (reminds the reader that he/she *requested* this *memo*). **Continue** that introductory sentence with a short *description* of what the memo will describe or cover.

**HUGE TIME-SAVING** **HINT**: See how I phrased **the introductory sentence/paragraph** of these Assignment Instructions above! ☺

***MORE ON PAGE TWO!!***

***BODY***: Use **complete sentences** and **list,** **number,** **answer**, and **address** ALL seven (**7**) items below in the same order as they are listed:

1. In what skill and trait areas did you score highest and lowest on textbook ***Activity 1.3***? **Describe**.
2. (a) How do you think your family, friends, past or present co-workers, and supervisor(s) would rate your skill and trait areas? (b) **Why** would they rate them this way?
3. (a) Which of these skills and traits do you think are important for an employee to possess in **your** particular current or future career area? (b) ***WHY*** are these important for your field?
4. (a) Are you *satisfied* with your present level of these communication skills? (b) Explain *why* or why *not*? (c) What **steps** could you take to become *even better*, even if you are *already* highly skilled? *Note*: *Avoid* the tired old cliché *“There is always room for improvement.”* Not only is it a cliché, but uses the weak filler word “there.” All of us can improve in some area, but use something more original, such as, *“I could improve my \_\_\_\_\_ skills” or “could further develop my \_\_\_\_ skills” or “could be better at \_\_\_\_.”* Also do **not** use the old-fashioned, “*better myself.”* Use “improve,” instead. (See *Grammar Review Packet* in Week 02 Module.)
5. Re-read the Syllabus (Course description, Course Level Learning Outcomes, Requirements, Assignments, Employer’s quote, etc.) and textbook's *Table of Contents.* (a) Which class **components** and text **Chapters** do you think can help you to improve the skills/traits mentioned above, to increase your "marketability" or success even *more* in your current or future field? (b) **How**? (**Note**: Skip Chapters 15 or 16; our class does *not* cover these.)
6. Pick ONE of the *Lamoreux's Laws* that you could use to help develop one or more of these skills/traits. Name and **describe** (a) **which** tip (not just the number) and (b) **how** it could help you develop the skill(s)/trait(s).
7. What is your *TENTATIVE* **report topic** idea for your short written and oral reports? (See Discussion Forum 1 and Past Student Report Topic Examples) An answer to this is **required**. It’s fine if you change your mind later.

**CLOSING:** **Finish** your **one-page** memo with an appropriate and courteous "*goodwill, forward-looking closing*.” Don’t end abruptly. A forward-looking closing is literally, *"I look forward to \_\_\_\_\_\_\_…"* Then continue thatsentence or short paragraph by **describing** something you **look forward to** in regard to the class and your skill development. (Use “something” *besides* *“getting the credit, getting it over with, or getting a good score on my ISAM*.” Those would not be good “reader benefit” or goodwill--or score helpers. ;) )

**TONE:** Be sure to maintain a *civil*, *positive, pleasant, polite,* and *professional tone* throughout your memo, as business professionals do.

I look forward to receiving and reading your ISAM!

**OTHER ISAM DETAILS**

**REVISING**:

* Before, during, and after writing, use the ***Professional E-mail and Memos Checklist*** on **page 211** AND the specific-to-***ISAM Checklist*** in this Assignment Packet.
* Use all that you read about *Clear Writing Techniques* from Chapters 4, 5, and 6, including **conciseness, completeness, clarity, correctness**, **appropriate and courteous tone**.
* **WARNING**: Proper formatting counts, as it demonstrates professionalism. See page 3 for *How to Format a Memo.*

**SUBMIT IN ALL “*3 WAYS OF SUBMISSION***”:

Submitting in **all** 3 ways by due date is **required**. See customized Course Calendar for deadline.

(1) Canvas Assignment Submit to instructor through the Assignment Link AND

(2) Email to klamor@edcc.edu as attachment AND

(3) Into the SAME email, PASTE the text into the body

**\*Quick Guide to True Single Spacing in WORD 2007 and Beyond Documents:**

**\*True *Single-spacing****:* Default spacing was single (only 1 space between lines) through Word 97-2003, but changed to **1**.**15** spaces in between lines in and after Word 2007. This reduces how much you can fit on a page! You **must** use TRUE single spacing (with 0 before, 0 after, and “single setting”) for **ALL** BSTEC 110 documents. See below to learn how to change to single-spacing temporarily or as your Default (or ask an EdCC lab assistant for help, or Google some videos). True single-spacing helps you keep your memos and letters to the typical **one**-page length!) **Warning**: Do NOT simply choose “No Spacing” in the *Styles* bar; that is NOT the same. Don’t *assume* you know how to do this: read the instructions, and avoid losing points.

1. “**Select all**” (Drag Cursor or use CTRL-A) of your page contents.
2. In **HOME** tab view, find the **Paragraph Section** on the ribbon (has bullets/numbering, alignment, etc.). Look for the little arrow at the bottom of that section, to the **right** of the word “Paragraph.”

1. Click the little arrow next to the word “Paragraph” to open up a dialogue box.
2. Set **Spacing** to “**Before**” at “0 pt.” and “**After**” at “0 pt.” (But you’re not done yet!)
3. **ALSO**, to the right, click the drop-down box to select “**Single**” for “**Line Spacing**.” You MUST COMPLETE this step, or you will not achieve true single spacing.
4. Click “**OKAY**” to make this a *temporary* change for JUST this document (recommended), **or** click “SET AS DEFAULT” to have **ALL** of your future WORD documents set in single-spacing automatically.
5. Put back in any missing paragraph breaks, since one blank line should be between paragraphs, unless they are part of a numbered or bulleted list.
6. Below is what true single spacing settings look like:

Remember: Set **Spacing** to **0 before** and **0 after, and** set **Line Spacing** to **Single**!

**HOW TO FORMAT A MEMO**-(targeted to the ISAM Assignment)

Use **MEMORANDUM** heading for your ISAM-**DON’T use Assignment name as a heading**. No letterhead address needed.

***ALIGN*** *TEXT* ***LEFT*** *Use an easily readable font like Arial or Calibri, 10-12 pt.*

*LEAVE ABOUT (can be “played with”) A 2-INCH TOP MARGIN FROM VERY TOP OF “SHEET” BEFORE TYPING THE “DATE”*

 ***CAPITALIZE*** *"****DATE, TO, FROM, SUBJECT****" LEAVE 1 BLANK LINE BETWEEN EACH.*

 BEGIN cue word content AT 1-INCH RULER MARK (Use Toolbar above)

DATE: Current month name, day (numeral), year *(Example: May 5, 2014)* ***NO*** *ordinals, like 1st 2nd, 3rd, 4th and no /*

TO: Name of Recipient (Your ISAM assignment is written to ***Karen Fischer Lamoreux****)*

 *LEAVE 1 BLANK LINE BETWEEN EACH*

FROM: Your Full Name *yfn*  *Write* your initials in lower or upper case at the end of this line, next to your name or--if used—your job title. Use a "Handwriting" font like Lucida Handwriting for electronic documents.

SUBJECT: IDENTIFY TOPIC IN ONE-LINE SUBJECT LINE CAPITALIZE ALL OR MAJOR WORDS IN SUBJECT LINE

*LEAVE 2 BLANK LINES BETWEEN MEMO SUBJECT LINE AND FIRST SENTENCE*

*LEAVE 2 BLANK LINES BETWEEN MEMO SUBJECT LINE AND FIRST SENTENCE*

This memo explains how to format and compose a memo, which is a document form, more formal than e-mail, used for communication within an organization. (Letters are used to communicate outside the organization.)

*LEAVE 1 BLANK LINE BETWEEN PARAGRAPHS*

* **NEVER** use a SALUTATION ("*Dear so-and-so*") in a **MEMO.** Letters use that. Don’t create the mutant “LEMO.” ;) You MAY, however, use the person's name *as part of* the first (Introductory) sentence.
* In a ROUTINE REPLY memo (like the ISAM), include an "*authorization*" (*As you requested, Karen)* in Intro. An *authorization* reminds the reader that he or she requested the memo. Your *introductory sentence* "announces" what you’ll cover in the memo. *(Example: " As you requested, Karen, here is my ISAM, which will describe …"* or *"As we discussed, Ms. Lamoreux, here is my ISAM, where I will describe …)*
* Use **left-aligned** Business Block style for paragraphs. **DON'T** indent at the beginning of a simple paragraph (unless it’s a bulleted or numbered list, of course!) **NEVER** use “*Justify*” settings.
* Use the *default* setting for left and right Margins (1" to 1.25"). (See **page 212** in Guffey book.)
* Use *TRUE single-space*\* formatting within paragraphs (see first paragraph and below paragraph).
* Leave one blank line between paragraphs (hit "enter" to create a “hard break” and click the ¶ button on your ribbon to see the paragraph breaks).

*LEAVE 1 BLANK-LINE BETWEEN PARAGRAPHS*

The closing paragraph should have a "*forward-looking close*” (something class-related that you are *looking forward* to besides your grade, the credit, or getting it over with!) ;) **DON'T** use a *COMPLIMENTARY CLOSE* (no "*Sincerely*") or a SIGNATURE BLOCK (letters, not memos, use those). Your *initials* by your name (above) are your "signature" in a memo!

*LEAVE 1 BLANK-LINE BETWEEN PARAGRAPHS*

I look forward to reading your memo! (Notice this "*forward-looking closing*!” ☺)

*Leave 1-3-lines-depending upon balance- under last paragraph.*

*Do NOT use a complimentary close or Signature block-those are for letters, not memos!*

***BELOW IS A "NOTATIONS AREA,“ if used. Your ISAM will NOT have these, but you should be aware of them.***

YN:dpl Typist’s initials are used **ONLY** if the memo was written by one person (initials-in this case, YN) and then keyed/typed by another (in this case, dpl).

 USUALLY *LEAVE 1 BLANK LINE BETWEEN NOTATIONS*

Attachments (2) Enclosures/Attachments notification. **Attachment** means **stapled** to the memo. **Enclosure** is loose, added to the envelope. It's unusual to put a memo in an envelope, but it happens. ONE enclosure does not require a number.

 USUALLY *LEAVE 1 BLANK LINE BETWEEN NOTATIONS*

cc: S. Smith, Vice-President

 J. Johan, Manager *ONLY if copies given to others BESIDES reader. May also spell out full name; include position title or omit.*

***See page 2’s “Quick” Guide to single-spacing, or ask an EdCC lab assistant about how to change to single-spacing temporarily or as your Default. (You can write more with single-spacing!)***

 **INITIAL SELF-ASSESSMENT MEMO (ISAM) CHECKLIST**

Review this Checklist **before, during,** and **after** writing your ISAM to save valuable revision time and points.

If you can't “check it off,” FIX the problem to earn points and professional expertise. ☺

**Note**: This Checklist is quite thorough, but read and follow the **Assignment Instructions** carefully, too!

|  |  |
| --- | --- |
|  |  |
|  | **FORMATTING-HEADING** |
|  | Studied formatting examples on page **212** in textbook and Example in ISAM Instructions. |
|  | Keyed in **MEMORANDUM** about 1.5 inches from top, or used blank heading. Did **NOT** use the name of the Assignmentas a Heading at the top.  |
|  | Manually formatted "cue word headings" in THIS order: DATE, TO, FROM, SUBJECT, in CAPS, **left aligned**. (**DON’T** use a WORD MEMO *TEMPLATE*!) Begin “cue words” about 2 blank lines below Memorandum heading.  |
|  | Left ONE blank line (called "double spacing") **between** the above CUE WORD lines |
|  | Placed the date, Karen Lamoreux's name, your name, and Subject line at the 1" **tab** **ruler** mark (see toolbar) |
|  | Spelled out the month, numeral for day, numerals for year. Did **NOT** use ordinals: 1st, 2nd, 3rd, 4th, etc. for dates and used US style (starts with and spells out month), not European or military style (starts with day) |
|  | Spelled **recipient's** name correctly (Karen Lamoreux, in this case!) |
|  | Used a "handwriting-type font" to put your initials next to your name and, if used, job title, which serves as a "signature" on a Memo. Upper or lower case. (On hard-copy Memo, you would initial by hand, of course.) |
|  | Used a one-line SUBJECT LINE that "headlines" what the document is and what it contains. CAPITALIZED (permissible to capitalize **f**irst letter of each major word, if you know how, but "110 Company" suggests all CAPS). |
|  | Left TWO blank lines (called "triple spacing") between **Subject Line** and the first sentence. |
|  | **OPENING/INTRODUCTION** |
|  | Began with an "*authorization*" in conversational tone *("As you requested, Ms. Lamoreux,").* Did **NOT** use ***trite*** business phrases like "*As per your request, pursuant to your request," etc. Eeek!)* (See pages **178 and 184**) |
|  | **Continued** that **SAME** sentence with a *descriptive introduction* of what this document is, and what it will include (for example, *"…here is my ISAM, which will describe \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_…")*  |
|  | After the brief introductory sentence or short paragraph, began a **new** paragraph for Body (leave one blank line in between paragraphs). **NUMBERED and LISTED** answers correspond to questions (see below). |
|  | Used “single spacing" within paragraphs, but left ONE blank line between paragraphs |
|  | **BODY** |
|  | Body provides what was promised in the introduction/opening, and in the order it was promised. |
|  | As instructed, used a numbered **LIST** to provide the information requested in the seven items (this **one**-page Memo is too short to effectively use more than one list), introduced with a properly used colon. Did **NOT** include the questions, just answers. Did **NOT** use the clichés, “There is always room for improvement” or “better myself.” |
|  | Addressed all items thoroughly, yet concisely, using Clear Writing techniques described in Chapters 4, 5, and 6 (for example, avoided "fat" and unnecessary "filler") and kept Memo to **ONE** page maximum length. |
|  | **CLOSING** |
|  | Used a sentence or short paragraph that "wraps up" the Memo courteously, including a **sincere** "forward-looking close" *("I look forward to…")* related to the **topic** of the Memo and/or class. |
|  | Capitalized all words that should be capitalized. (Did not use "text messaging" abbreviations or lack of capitalization. Capitalized "I" for personal first-person pronoun. Spelled out "want to," not "wanna," etc.) Definitely capitalized the word English or other language names, if used! |
|  | **OTHER** |
|  | Maintained positive, pleasant, professional "**tone**" throughout. This does not mean "dry and dull," or lacking wit and *gentle* humor, but it *does* mean business-like (no negativity, insult, rudeness, complaining, incivility, or sarcasm). |
|  | Did **NOT** use a signature block at the end (because it is a memo, **not** a letter). Did not create a “*LEMO*!” |
|  | Ran Spellcheck. Read **out loud** to catch errors or odd phrasing. Had **someone listen and proofread**. |
|  | Checked grammar and punctuation. Passed *CCCCCAT Scan*: **C**lear, **C**oncise, **C**omplete, **C**ourteous, **C**orrect **A**ppearance and format, appropriate **T**one. |
|  | Used **TRUE SINGLE-SPACING** (see page 3) with Spacing of 0 pt. before, 0 pt. after, and “single” Line Spacing. |

©2000 kfl rev. 2001-2015