

A DESCRIPTIVE STUDY OF PERCEIVED AND ASSESSED BUSINESS  
LETTER WRITING PROBLEMS OF BANKERS IN BRANCH LOCATIONS

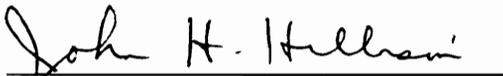
by

Ellis A. Hayes

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APPROVED:

  
B. J. Schmidt, Chair

  
J. H. Hillison

  
J. A. Norstedt

  
J. D. Oliver

  
J. R. Stewart

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Ellis Arnold Hayes

Committee Chair: B. June Schmidt  
Business Education

(ABSTRACT)

The study investigated business letter writing problems within the banking profession. It identified difficulties in letter writing aspects that bankers perceive; and it investigated the relationship of those perceived difficulties to assessed deficiency aspects in letters the bankers had written. A literature review revealed studies that addressed origination of business letters. These studies typically utilized either a survey of groups involved with writing or an analysis of completed letters. This raised the question of possible outcomes in combining the two approaches within a work setting.

A Q-sort technique was used to determine perceptions of 15 branch location bankers concerning difficulty of 40 composition and 40 technical letter writing aspects. The bankers ranked the following composition aspects highest in difficulty: legalese; persuasion

techniques; refusal conveyance; unfavorable news conveyance; conflict resolution; and direct versus indirect approach. They ranked the following technical aspects highest in difficulty: infinitives (split); sentence syntax; antecedents of pronouns; wordiness (excessive); dangling participles; and preposition usage.

The bankers answered a survey concerning their access to training and instruction in business letter writing. Each banker submitted four recently originated business letters. Composition aspect deficiencies within bankers' submitted letters were assessed by a panel of postsecondary business communication instructors. Combined grammar-checking software and researcher screening determined deficiencies for technical aspects of the letters. A total of 900 non-repetitive deficiencies were assessed in the 60 letters submitted--an average of 15 per letter. Comparative percentile rankings showed that perceived difficulties differed most from existing deficiencies in the following aspects: composition--(perceived difficulties greater) refusal conveyance and euphemisms, (assessed deficiencies greater) sentence construction and letter organizing/structuring; technical--(perceived difficulties greater) split infinitives and dangling participles, (assessed deficiencies greater) spelling and pronoun usage.

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CHAPTER 1  
INTRODUCTION

Strong communications skills comprise a cornerstone of successful business relations. Students, instructors, and businesses recognize a continuing need to improve communication skills (Wedell & Allerheiligen, 1991). In interactions between businesses and their clientele, written correspondence has long been a means of information exchange that can fulfill needs for conventions and ongoing records. Thousands of employees must write well in order to succeed in their careers (Aldrich, 1982).

Written correspondence serves many industries as a sales and promotions vehicle. In nearly all its forms, company-generated written correspondence can convey a spirit of goodwill--an intangible element of continued relations and revenue-generating opportunities.

In an example of a difficult letter writing task, a business professional may be responding to a client's complaint. Although circumstances preclude granting the adjustment sought by the client, the business professional needs to propose an alternative that will preserve the business relationship amid "buyer's market" conditions. Moreover, the professional who expresses

conventional diversions to shield unfavorable news may, in fact, alienate the client with the very technique considered appropriate (Brent, 1985).

While business professionals may enjoy the time-saving features of office automation in originating written correspondence, personalized composition is still required. The efficiency of thought and information-gathering activities of the prewriting stage may vary due to a number of factors. Most of these confirm the privacy and individuality of the writing process (Bowman & Branchaw, 1987).

Internal factors such as motivation, anxiety level, perceived urgency, and attitude toward the recipient can affect the writing process. External factors also play a role. Examples may include prior training in serving the needs of the recipient, the scope of required written correspondence activities and their relationship to other duties; access to information needed to make the correspondence relevant, and the organization's ability to provide products and services that meet legitimate expectations.

Originators of external business correspondence must meet challenges not only at the prewriting stage, but at the drafting, revising, and editing stages as well. Hyslop (1990) referred to this as a process

approach of recursive activity. The ability to write is a basic skill that most business professionals are taught to exercise long before making a commitment to their professions. Many gain training and experience in letter writing early in their schooling years.

Collegiate business majors are likely to receive some instruction and practice in business letter writing. These students typically embark on business writing instruction with considerable naivete toward the subject (Griffin, 1987). Perhaps due to suspect general writing skills, students are more often prompted to eliminate grammatical errors than to improve writing content and style. Timmons (1988) suggested that academics often fail to teach writing based on adaptation to realistic job conditions.

Consequently, students may succeed in class but later encounter a twofold problem. First, they have not gained enough practice in actually addressing reader needs in a manner most favorable to future business-client relations. Professional writers (former students) may not distinguish between the "real reader . . . a concrete reality" and the "implied reader . . . an abstraction to be shaped within the text" (Thralls, Blyler, & Ewald, 1988, p. 47). Second,

to the extent that the more difficult psychological issues are avoided in letter writing, a parallel risk is run that technical errors will become a greater concern as more complex styles and problem-solving content are eventually mandated in business correspondence at work.

On the other hand, some students exhibit a great deal of insight and creativity in composing business letters for diverse situations presented to them. They have more difficulty with the technical aspects of letter writing than with idea formation. One would suppose that the greater problem is overcome if all a writer lacks is the ability to edit and correct simple grammatical flaws. However, the frustration of continued difficulty in "getting it right" can diminish eagerness to express thoughts in business writing.

While courses in business writing are usually available to students, they are often optional--even for business majors. Tebeaux (1988), who surveyed 250 college-educated writers in business organizations and local government, learned that 87% of those writers gained no course-based writing instruction beyond freshman composition. Fewer than 20% of the writers indicated that errors in spelling, punctuation, and usage were marked by instructors of at least some courses within their major fields of study (Tebeaux, 1988).

Businesses may consider opportunity costs in relation to external letter correspondence. The lack of a reply, or lack of a timely one, to a request for information or clarification may result in the loss of a prospective customer. Further, the slow or missed reply caused by lack of a responsive posture, in spite of prompt efforts by designated personnel, could signal deeper organizational concerns within a company.

The researcher investigated a problem area given rise by two existing conditions. First, field-based assessments help identify needs in preparing business writers for their tasks. Second, successful business correspondence involves the application of both composition and technical aspects. An analysis of perceptions and outcomes among these aspects may suggest better ways to direct energies in correspondence-related instruction. Likewise, insight into the interplay of these aspects within a workplace context may further shape training strategies in business writing.

### Research Questions and Purpose

This study seeks understanding of business letter writing through inquiry and assessment within a particular workplace category. First, it explores difficulties

in letter writing that bankers perceive. Second, it investigates the relationship of their perceptions to the nature and extent of deficiencies in the actual correspondence they prepare on the job.

The study puts forth the following questions for investigation:

1. Which composition aspects of writing external letters do bankers perceive as difficult?
2. Which technical aspects of writing external letters do bankers perceive as difficult?
3. What composition deficiencies exist in the external letters of bankers?
4. What technical deficiencies exist in the external letters of bankers?
5. How does perceived difficulty in composition aspects of letter writing relate to composition deficiencies that exist in the letters of bankers?
6. How does perceived difficulty in technical aspects of letter writing relate to technical deficiencies that exist in the letters of bankers?

This study was designed to assist business practitioners and business educators in the improvement of external written communication by broadening the understanding of key aspects related to writing efficiency. Through a comparative analysis of the perceptions of

business professionals toward the letter writing process and the products of their efforts, a realistic assessment of needs and strategies for increased effectiveness of business letter writing was sought.

### Need for the Study

Census data indicated that the average American receives around 300 business letters per year (Goodin & Swerdlow, 1987). The competition for a typical reader's time is keen indeed. By making business letters more effective, a business may increase the likelihood of desired reader attention, acceptance, and response.

Carnevale, Gainer, and Meltzer (1990), in their publication entitled Workplace Basics: The Essential Skills Employers Want, alleged a disparity between the needs of workplace writing and the traditional classroom approach to teaching writing. Workplace writing requirements go beyond traditional academic objectives and focus on "analysis, conceptualization, synthesis and distillation of information, and clear, succinct articulation of points" (Carnevale, Gainer, & Meltzer, 1990, p. 11).

In a 1982 survey, some 1,158 recently promoted business executives selected business communication as

the most important course preparation for business leadership (Fine, 1983). Administrators and managers who can express their thoughts effectively and correctly in correspondence were regarded as more competent by their superiors (Tracey, 1988). Further, in a survey of 837 graduates of Miami University's School of Business Administration, 98% of the respondents indicated that they write as part of their present jobs (Storms, 1983). Forty-three percent spent the rough equivalent of at least one work day per week writing on the job. On average, respondents spent 24.9% of their work time writing (Storms, 1983).

In a survey of 42 recent business graduates who work in Fortune 500 corporations, 78.2% of the respondents periodically used letters for business communication purposes, while 43.8% indicated frequent use of letters. The respondents ranked "lack of conciseness" as the second most serious communication problem behind "poor listening" (Bednar & Olney, 1987). Business letter writing instruction has long included the need for conciseness.

Kallendorf (1985) argued that in actual business prose --including that found in letters--writers often strive for stylistic polish by including figures of speech generally discouraged by clarity-conscious busi-

ness writing texts. The rationale for avoiding anything that may interfere with comprehension in business letters is cogent. However, the building of a distinguishing character or tone in a letter may be assisted by the use of style devices that are, as a rule, deemed distracting if not confusing in business correspondence.

Business writing texts list examples of phrases that are, on the one hand, clear or concise; and on the other hand, discourteous. Items on such listings must be considered within a given context. Hagge and Kostelnick referred to the "clear-concise" while "courteous" as "contradictory pronouncements," and urged demonstration of "how business writers assess trade-offs between these two variables by analyzing situational contexts" (Hagge & Kostelnick, 1989, p. 335).

Moran and Moran, contributors to Research in Technical Communication: A Bibliographic Sourcebook (1985), contended that serious research for establishing principles of business letter writing is only beginning to emerge. "Instead of designing innovative research projects, writers in the field have tended either to rely on a kind of folk wisdom handed down from generation to generation of writers or to depend on rather limited personal experience" (Moran & Journet, 1985, p.

313).

Collectively, these concerns legitimize the need for research in business letter writing within the scope of workplace standards.

#### Delimitations and Limitations

To examine the external letters created by a professional group, the primary data of this study were gathered from a single business type--commercial banking. Fifteen bankers each participated by providing a sample of four external business letters. Two examples from each of two broadly characterized letter style types, direct and indirect, were included in each writer's sample. The same group of bankers completed an instrument designed to indicate their perceptions about composition and technical difficulties of external letter writing. In addition, computer assisted technical assessments of the bankers' sample letters were conducted; and six postsecondary instructors of business communication each independently assessed composition quality aspects of ten sample letters.

The study did not employ selection criteria for bankers other than: (a) job duties that included external letter origination; (b) ability and willingness to provide the types of information requested; and (c)

meeting the number of participants predetermined by the researcher.

A third broadly characterized style type for business letters--the persuasive style--was not targeted in the collection of sample letters. This decision was predicated on several points. First, elements of persuasion are contained in both direct and indirect letter styles--not just in persuasive letter styles. Further, bankers tend to rely on corporate office initiatives in the area of direct mail marketing via persuasive style form letters. The solicitation of both direct and indirect letter styles helped secure samples more typical of bankers' writing requirements. Finally, this study did not focus on differences among broadly characterized letter styles. Direct/indirect style variety was sought so that a broader range of writing problems--stemming from more varied correspondence situations --could be investigated.

#### Definitions of Terms

Unless otherwise denoted, the following definitions are constant within this study. An external letter is an item of written correspondence, prepared by one party or its representative; primarily intended for and ad-

dressed to a party other than the preparer's; and being construed as a business letter according to generally accepted conventions.

A banker is a person who is employed at a bank's branch office, and who has direct customer or client service responsibilities that routinely include drafting of written correspondence.

A composition deficiency (of an external letter) is any of a variety of shortcomings in the letter's style of expression apart from and beyond that of a technical nature; which, according to its attribute and/or context of occurrence, is detectable by independent review --though subject to diverse opinions among reviewers concerning its error status or severity. A technical deficiency (of an external letter) is a discernible flaw in such a letter, the source of which relates to either (a) a grammatical weakness; (b) a punctuation error; or (c) a format inconsistency.

A direct style letter is a letter characterized by early or immediate mention of the main point(s) or response(s), followed by additional/supporting information and details. An indirect style letter is a letter characterized by supporting details and explanations in its early stages; leading to the main point(s) or response(s) that are subsequently stated or implied.

## Organization of the Study

A literature review was conducted to ascertain research efforts in the area of business writing--particularly those studies concerned with letter origination. This review, described in Chapter 2, helps identify areas of needed research. It also provides a basis for the selection of composition and technical aspects used within this study for data collection.

Site selection and participation criteria were determined on the basis of research question requirements, as well as the nature and scope of this investigation. Chapter 3 describes the methods of primary data collection, interpretation, and analysis employed in this study.

Chapter 4 describes primary research findings. Chapter 5 summarizes, discusses, and recommends on the basis of secondary and primary research.

## CHAPTER 2

### REVIEW OF RELATED LITERATURE

A literature search was conducted to examine research conducted in the area of business correspondence. With respect to the purpose addressed herein, a review of those studies deemed relevant follows.

#### Studies Involving Writing Perceptions

The first two questions put forth for investigation in this research were stated as follows:

1. Which composition aspects of writing external letters do bankers perceive as difficult?
2. Which technical aspects of writing external letters do bankers perceive as difficult?

#### Major Themes

Among the business correspondence issues addressed by studies in this section are the following: difficulties, formalities, word choice, and situational adjustments in writing; components believed integral for business achievement and curricular inclusion; and involvement in writing tasks at various levels. Other studies compare correspondence needs in business as perceived by student, faculty, and business groups. Some offer student-based insight as to how academic

programs are addressing business writing needs. Factors such as computer aids and vocabulary awareness are examined.

### Pertinent Findings

Aldrich (1982) sought to identify factors that interfere with the writing efforts of adults in government (Pentagon staffs; Army personnel; Department of Labor) and the private sector (Rand; BDM; Planning Research Corp.). One hundred sixty-five respondents completed a questionnaire on which they ranked the sequence of tasks in "preparing to write" according to their actual practice (unused steps could be omitted). Tasks listed on the survey included: research subject; determine point you intend to make; identify audience; determine purpose of paper; plan or outline paper; limit subject; discuss paper with colleague; and discuss paper with supervisor.

Aldrich concluded that few of the respondents sequenced the "preparing to write" tasks in an orderly manner; and some omitted steps necessary to the process. Respondents also answered a few questions regarding attitudes toward writing. Aldrich reported a tendency for respondents to view writing in a negative fashion. In general, adult writers may lack training in writing

preparation that causes a variety of problems--such as overconfidence, anxiety, defensiveness, and reluctance.

Flatley's (1982) research identified written communication engaged in by managers, and how it differs according to managerial level. It sought ways to anticipate written communication needs of managers, so that training delivery methods might be enhanced. Questionnaire data were obtained from 89 managerial personnel.

Flatley concluded from the study's findings that distinct differences in written communication training needs exist, due to the varied demands of lower, middle, and upper managerial levels. Essentially, Flatley called for solid, broad-based training at the low-to-intermediate levels; with a shift toward more focused, specialized assistance at the mid-to-higher levels. Formal courses, while certainly appropriate in preparing prospective managerial personnel, must keep abreast of businesses' particular needs and technological advances in communication. All communication training options, such as courses, seminars, conferences, and workshops, may offer certain advantages to any managerial level. Any option may be appropriately or inappropriately adapted to the needs of a particular business management group.

Gilsdorf (1983) used Likert-type scale questionnaires to help determine the attitudes of 120 executive vice-presidents toward business slang. Some of the questions pertained to the use of slang in business writing. Seventy-five percent of the respondents characterized their prospects of using slang in formal business writing tasks as unlikely. However, 60% reported that they are likely to use slang in informal business writing.

A majority of the respondents objected to any use of slang in business letters, and few respondents indicated outright support for such usage. Anti-slang sentiment in letters, therefore, was strong; although slang usage in reports was opposed even more strongly. Respondents were fairly evenly split on the question of slang usage in memoranda.

It is possible that the expressed attitudes toward slang in business writing were somewhat lenient due to the overriding focus of this survey instrument. The questionnaire seems to have dealt primarily with the use of slang expressions in oral communication situations. Still, the findings regarding business letters suggest strong anti-slang attitudes on the part of executives surveyed.

Feinberg and Pritzker (1985) used qualitative and

Delphi methods to describe a course model for business communications at the MBA level. Respondents consisted of over 150 executives within the Marmon Group, a diversified complex of companies.

The respondents suggested 83 items on their first questionnaire; these were placed on a frequency distribution chart. Based on frequency of mention and assigned importance, the following six topics emerged as major categories: (a) wordiness (most important); (b) format for documents such as letters and reports; (c) organization of data and thoughts; (d) audience; (e) grammar; (f) vocabulary.

The second questionnaire condensed the original collective listing to 44 items. Respondents arranged these items within the six major categories. Feinberg and Pritzker used a hierarchal clustering technique to complete the course model shown in Table 1.

Feinberg and Pritzker concluded that business communications textbooks tend to neglect several prominent concerns of business executives. The pattern of executives' responses necessitated the following extension of main topics in the course model: #7--ACCEPT RESPONSIBILITY FOR WHAT YOU SAY + ORIGINALITY; #8--RELEVANT DETAILS + ACCURATE FACTS; #9--ARGUMENTA-

Table 1

Feinberg and Pritzker's Course Model for Business

Communication at the MBA Level

---

Topic A: WORDINESS	Topic D: AUDIENCE
Items:	Items:
brevity simple direct sentences redundancy/repetitiveness irrelevant information	diplomacy knowing when and to whom to communicate appropriate tone
Topic B: FORMAT	Topic E: GRAMMAR
Items:	Items:
letter format report format memorandum format attachments and documentation appearance effective illustration	syntax misplaced modifiers punctuation run-on sentences verb agreement confusion of adjectives and adverbs
Topic C: ORGANIZATION	Topic F: VOCABULARY
Items:	Items:
paragraph development stating the purpose paragraph structure logical sequence of thought clear conclusion emphasis of significant points	euphemism choosing the correct word cliche jargon slang spelling

---

TION; #10--CLEAR MEANING; #11--PROOFREADING.

Bennett and Olney (1986) asked 35 Fortune 500 executives to point out the communication skills that they consider necessary for business achievement. The executives rated letters and memoranda as the most frequently used forms of business communication. They rated written communication skills virtually as highly as interpersonal skills, and substantially above oral communication skills.

The two communication problem areas most often encountered by the executive respondents closely relate to written correspondence. The two problems--lack of clarity and lack of conciseness--led the next highest problem areas (poor speaking ability, poor listening skills) by a considerable margin. The respondents selected lack of clarity as the single most serious communication problem (ahead of poor listening skills, lack of conciseness, poor speaking ability, and poor analytical skills, respectively).

Bennett and Olney concluded in part that communications ability plays a major role in the success and advancement of business executives. Because a wide range of skills were cited by executives as needing strong emphasis, a sequence of courses may be necessary to expose college business majors to needed written,

oral, and interpersonal aspects of communication.

Laviviere (1989) sought to identify writing competencies lacking in business by determining those writing skills with average-to-poor ratings. Data were supplied by 88 members of Professional Secretaries International in the following areas: rating their own writing skills; rating their bosses' writing skills; and rating their bosses' writing principles.

The professional secretaries rated both themselves and their bosses lowest in the skills of "criticizing" and "refusing tactfully." The secretaries rated their bosses lowest in the writing principles categories of spelling, run-on sentences, and dangling participial phrases. Over half rated their bosses in the average-to-poor range in these English grammar usage skills.

Among the study's suggestions to business communication instructors were the following: (a) supply exercises for improvement in grammatical principles (including computer-assisted instruction), but avoid focusing primarily on this area during instruction; (b) have students develop outlines for bad news or critical letters; (c) establish opportunities for students to discuss weaknesses in actual letters, and to rewrite

them.

Hiemstra, Schmidt, and Madison (1990) gathered data on communication perceptions from 269 Certified Management Accountants (CMA). They sought to fill a void in communication-related literature by focusing on a senior management group such as CMAs. Respondents supplied the following types of information: "communication skills used; educational training; perceived importance of various communication skills; frequency of skills usage as they pertain to various ways of communicating; and areas where improvement in communication skills are needed" (Hiemstra, Schmidt, & Madison, 1990, p. 6).

On a Likert-type scale ranging from one (seldom) to five (very frequently), the Certified Management Accountants indicated average frequency of engagement in the following written communication methods: memorandum -- 3.87; letter -- 3.35; formal report -- 3.06; proposal -- 2.47. Thirty-six percent of the CMA respondents indicated dissatisfaction with their prior training in writing skills. Forty-five percent of the CMAs had taken some formal undergraduate coursework in written business communication.

Hiemstra, Schmidt, and Madison concluded in part that as the respondents progressed in their careers, their need for communication skills intensified. They

raised questions for further research regarding who should teach what communication skills, and at what level.

Leonard and Gilsdorf (1990) studied usage errors as perceived by executives and academics. They received questionnaire responses from 133 executive vice presidents and 200 members of the Association for Business Communication.

Respondents viewed 58 written sentence items, which together represented 45 different usage element weaknesses (some were repeated). Items representing the following element weaknesses were found to be most bothersome to respondents (in descending order): (a) run-on sentence; (b) no punctuation between long dependent clause and main clause; (c) parallel construction error; (d) sentence fragment; (e) dangler; (f) parallel construction error [repeat]; (g) "I" as object of verb; (h) sentence fragment [repeat]; (i) no commas around parenthetical insertion; and (j) "principal" used for "principle." In general, sentence-structure errors were among the most bothersome to respondents.

Respondents found items representing the following usage element weaknesses as least bothersome (in descending order): (a) "feel" instead of "believe"; (b)

"quote" instead of "quotation"; (c) anxious/eager; (d) "prioritize"; (e) "data" used as singular; (f) "everybody...they"; (g) disinterested/uninterested; (h) parenthetical expression without commas; (i) "situation is when" [adverb clause as complement of linking verb]; (j) subject-verb agreement in inverted sentence.

Leonard and Gilsdorf recommended in part that business communication teachers emphasize those weaknesses of usage receiving legitimate error status by a consensus of users.

Wedell and Allerheiligen (1991) studied attitudes of students toward computer aided instruction; in essence, the extent to which they perceived CAI as a means of enhancing their writing skills. They surveyed 327 students from business communication classes, about two-thirds of whom had used the computer and software system entitled Writer's Workbench. Questionnaire items were presented on a 5-point Likert-type scale. The items sought student impressions regarding effectiveness of class components toward their communication skills.

The students exposed to Writer's Workbench perceived significantly greater effectiveness in the following areas: nonwritten skills; writing conciseness (all assignments); improvement (dictation letter assignments); courteous and considerate writing (dictation

letter assignments); correctness (dictation letter assignments); and oral communication. The students who had not used Writer's Workbench in the classes perceived significantly greater effectiveness in the following areas: improvement (short report assignments); and importance of communication skill in their careers.

Wedell and Allerheiligen concluded that although students exposed to computer aided writing instruction gained perceived improvement in several important areas, these increased perceptions of effectiveness were generally limited to one particular writing assignment (dictation letter). Greater perceptions were usually not present for other report writing, letter, and memo assignments. Overall, results were mixed; some data could not be logically explained.

Wedell and Allerheiligen recommended that teachers of business communication continue emphasizing writing principles through conventional modes of instruction. At the same time, they should encourage further exposure to computer aided instruction, since little evidence suggested a negative effect of such exposure.

Storms (1983) used the survey responses of 837 Miami University School of Business Administration graduates to identify the types and importance of writ-

ing tasks that they undertake on the job. Sixty-seven percent of the respondents indicated that they prepare letters either "often" (34%) or "very often" (33%). Of the 13 kinds of written communications listed, only memoranda were indicated as prepared more than letters (37% often; 34% very often). However, when "sometimes" percentages are combined with "often" and "very often", letters (92%) hold a slight edge over memoranda (90%); and when "rarely" is combined with the aforementioned categories, letters (98%) again lead memoranda (96%).

The next most frequently prepared category of written communications was short reports; followed by step-by-step instructions or procedures, proposals to customers or clients, in-house proposals, guidelines or policy statements, long reports, scripts for speeches or presentations, advertising or promotional materials, minutes of meetings, feature articles or news releases, and articles for professional journals. Storms suggested that respondents may be less aware of some writing skill categories than of others; and that they may regard certain categories as more important because of their perceived visibility to target readers.

Respondents more frequently chose "writing clearly" as one of the top three writing skills perceived as important to their jobs than any other skill category.

The following writing skill categories ranked in order behind "writing clearly" in terms of total mention in top three positioning by respondents: "clearly stating your purpose to the reader"; "knowing how to organize a communication"; "writing concisely"; "using acceptable grammar, spelling, and punctuation"; "writing persuasively"; "selecting the information readers need"; "understanding readers' attitudes"; "using appropriate tone of voice"; "knowing how to use visual aids"; and "knowing how to construct tables and graphs."

The following categories received the most frequent selection, respectively, as the single most important writing skill: "knowing how to organize a communication"; "clearly stating your purpose to the reader"; "writing precisely"; "writing clearly", and "using acceptable grammar, spelling, and punctuation."

A recommendation of the study was that a variety of research tools be used to design and teach more effective courses in business communication. In particular, Storms mentioned "carefully designed surveys, analyses of collected writing samples, interviews, and small groups of professionals" (Storms, 1983, p. 18).

Quible (1991) gathered the ratings of over one hundred university graduates regarding writing competen-

cies perceived as important in their job responsibilities. Some 30% of the respondents were categorized as involved in professional business services; 21% were employed in financial areas. As these two categories were most closely akin to banking professions, this summary focuses on them.

Financial and business services professionals were among the groups (in addition to the wholesale-retail-trade category) perceiving a listing of 36 writing competencies as more important than those working in the following categories: communication-utilities-transportation; agriculture-petroleum; and manufacturing-construction. Employees in the various categories differed significantly (based on an analysis of variance test of weighted averages) in their collective perceptions of writing competency importance.

For the most part, the size of respondents' organizations had no significant effect on perceptions of writing competency importance. However, two competencies were found to differ significantly in importance for those respondents in the 500 to 2,499 organization size as opposed to respondents in smaller or larger organizations. These two competencies were: "is able to prepare effective graphic aids," and "is aware of essentials about letter parts."

Overall, the following categories (in descending order) led in importance ratings:

1. Writes coherently
2. Spells words correctly
3. Writes decisively
4. Uses words correctly
5. Uses grammar correctly
6. Sells ideas well in writing
7. Writes concisely
8. Uses effective arrangement of ideas
9. Has good proofreading skills
10. Uses punctuation correctly
11. Adapts material to the reader
12. Writes concretely
13. Constructs effective sentences
14. Focuses on the reader rather than on the writer
15. Organizes material well
16. Writes under pressure
17. Avoids redundancies in writing

Quible concluded in part that understandability of written messages exceeds reader-writer relationship factors in importance. Also, specific business communication competencies are less important than general writing competencies in developing business documents.

Among Quible's recommendations for further research was "a study comparing the perceptions of graduates and their supervisors regarding the importance of writing competencies" (Quible, 1991, p. 50).

Adkins (1982) compared employment expectations regarding business communication skill and knowledge as perceived by 19 business communications teachers, 291 of their students, and 56 business professionals. Respondents received a questionnaire containing 65 items describing various categories of skills and knowledge. Each item was to receive a perceived need rating for business employability on the basis of a zero (not needed) to five (very high need) Likert scale. Items were arranged in categories headed "written," "verbal," "grammar," and "other".

Adkins found that business, teacher, and student groups differed significantly in their perceptions of need in a number of items. Table 2 contains a selected listing of skills and knowledge presented to questionnaire respondents. The parenthetical codes indicate group differences for each item as a result of Analysis of Variance and Least Significant Difference tests. Significant group differences are indicated by the following codes: (B-T) between business professionals and teachers; (B-S) between business professionals and

Table 2

Selected Item Analysis of Group Differences in Business  
Communication Perceptions as Reported by Adkins

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Written

1. Knowledge of the importance of written communication in business
2. Knowledge of writing naturally and on the reader's level
- a 3. (B-S, B-T, T-S) Aware of the psychological aspects in writing--goodwill, "you" concept, etc.
- a 4. (B-S) Is skilled in organizing and outlining data
5. Ability to develop an idea into consecutive sentences or paragraphs
- a 6. (B-S, B-T) Knowledge of fundamentals of developing messages, letters, and reports
- a 7. (B-S, B-T) Knowledge of placement of the parts in the letter or report
- a 8. (B-S, B-T) Knowledge of present trends in letter and report writing
9. Awareness of the visual advantage of the written word
- a10. (B-S, B-T) Awareness of proofreading and proofreader's marks
11. Knowledge of vocabulary for accuracy and precision in writing
12. Ability to write well
13. Knowledge of correct placement of information in writing
- a14. (B-S, B-T, T-S) Awareness of direct and indirect approach in letter writing

(table continues)

Table 2 (continued)

Selected Item Analysis of Group Differences in Business  
Communication Perceptions as Reported by Adkins

---

Grammar

- 15. Has competency in spelling
- a16. (B-S, B-T) Uses punctuation properly
- 17. Knows the meaning of business words essential for self-expression
- 18. Constructs complete sentences

Other

- 19. Organizes work well
  - 20. Has the ability to think logically
  - a21. (B-S, B-T) Knows concepts of communication--sender, message, receiver, etc.
  - a22. (B-S, B-T, T-S) Has knowledge of readability and read ability formulas
  - 23. Uses ethical standards in writing and speaking
- 

a Item with significant differences in perceived need between groups, indicated parenthetically by:

- (B-S) = business professional-student differences
- (B-T) = business professional-teacher differences
- (T-S) = teacher-student differences

students; and (T-S) between teachers and students.

Adkins concluded that business professionals tend to disagree with educational institutions in terms of employable business communication skills and knowledge. Students, Adkins recommended, should be made aware of the competencies with the aid of increased businesses contacts. Adkins suggested further study to correlate business professionals' perceptions of student employment communication needs with students' actual use of various competencies after entering jobs.

Lemley (1983) studied the relationship of perceived business communication needs among groups consisting of 115 working undergraduate students, 106 of their supervisors, and 72 university faculty members. These groups of people received a survey instrument consisting of 28 business communications skills. Among the skills listed (those most closely related to letter correspondence) were the following:

1. Visualizing receiver of oral or written communication
2. Using words effectively and efficiently
3. Using parts of speech correctly
4. Structuring sentences efficiently
5. Writing grammatical paragraphs

6. Using transitional words and phrases
7. Punctuating efficiently
8. Spelling correctly
9. Arranging the parts of a letter
10. Requesting or providing information

Respondents rated each skill item on the following scale:

Very High Importance

High Importance

Average Importance

Low Importance

Very Low Importance

Lemley used the chi square statistic to test the hypotheses that no significant differences existed among the three groups in terms of communication need perceptions. Among the aforementioned skill items, respondents from the faculty group perceived a significantly greater need for competence than did working students in only one of these skills: (e.) writing grammatical paragraphs. Ten additional communication skills (totaling 11 out of 28) were perceived differently by faculty and working students. In every case, the faculty members' perceived need for the skills was significantly higher than the students' perceived need.

None of the aforementioned communication skills

were perceived differently by faculty members and work supervisors. However, nine other communication skills not closely related to letter correspondence received a significantly higher perception of need from faculty members than from supervisors. Supervisors' perception of one other communication skill significantly exceeded the expressed need of the faculty group.

No significant difference was found between working students and their work supervisors in any of the 28 communication skills on the survey, including the aforementioned ones. Lemley suggested that because working students and their supervisors were involved in joint experiences in particular business areas, there was more likelihood of agreement on perception of communication skills needed than of agreement with faculty. The faculty members, Lemley indicated, were more likely to perceive communication skill areas more broadly to cover additional work settings.

#### Summary of Writing Perception Studies

These studies raise a cluster of interrelated concerns. They indicate a perceived lack of preparedness for workplace correspondence writing, with respect to attitudes as well as skills and knowledge. Educators may rightly perceive the curricular needs of students in

a broader scope than do particular students or employers. However, they may lack a dynamic course model that addresses those needs. Also, students who do not complete a business communications course need exposure to its essential content in other English and business courses.

An examination of writing requirements at different managerial levels indicated the need for training strategies and delivery modes adapted to the various levels. The would-be or future manager presents a particular challenge to business educators, who are faced with identifying and addressing particular workplace communication needs while attending to basic and generic writing problems.

#### Studies Involving Writing Assessment

The third and fourth questions put forth for investigation in this research were stated as follows:

3. What composition deficiencies exist in the external letters of bankers?
4. What technical deficiencies exist in the external letters of bankers?

#### Major Themes

Some studies involving correspondence analysis

obtained survey or other data from those who composed the letters. Other studies compared their letter analyses with standards that were either expressed, published, or characteristic of various professions.

### Pertinent Findings

Limaye and Pompian (1991) studied the effect of nominal compound usage on business reading and writing efficiency. Nominal compounds feature strings of two or more consecutive nouns with no interjected prepositions, adjectives, etc.; e.g. "data collection process" as opposed to "the process of collecting data."

Lists of three- and four-word nominal compounds were shown to 162 undergraduate students in the College of Business at the University of Texas at Austin. Students from two subgroup majors, Information Systems and General Business, participated. A listing of the specific nominal compounds follows.

Information systems items:

- Management information systems
- Data base management systems
- Budget performance information
- B+-tree access method
- Microprocessor plant interface module

General business items:

Management information systems

Document analysis service

Consumer protection division

Complaint process manual

Debt collection practices

Participants were given seven possible definitions for each item. They were instructed to choose the best meaning, or to supply an original meaning if no suggestions were appropriate.

Participants were given two additional tasks. They were asked to indicate on a 5-point scale (totally, highly, somewhat, a little, not at all) their familiarity with each of the five phrase/items. They were also asked to re-write each item with the aid of clarifying words.

Limaye and Pompian concluded the following from their data analysis:

1. Writers cannot assume the ability of readers to correctly translate nominal compounds. Many readers fail to recognize the headword (last noun in the item) as the key to successful comprehension.
2. Readers tend to skip over or stop reading confusing written material, rather than processing it. The study data indicated that respondents showed greater familiar-

ity with items by re-writing them than by selecting an appropriate definition.

In addition to suggesting ways of stating nominal compounds more clearly (such as hyphenation), Limaye and Pompian recommended that business writers become more aware of their audiences.

Pearce and Barker (1991) investigated the question of whether computer-assisted composition provides a quality advantage over composition that is handwritten. Their study focused on reports rather than on letter correspondence.

Participants for data collection consisted of 160 undergraduate business communication students. Each student wrote two case study reports; one handwritten, the other on a university computer. Quality was assessed on the basis of six criteria for writing error checks (readability, passive construction, use of prepositions, trite expressions, wordy expressions, and redundant expressions); and four criteria for grammatical error checks (capitalization, punctuation, spelling, and vague adverbs).

Pearce and Barker found computer written reports to have significantly fewer punctuation errors than handwritten reports. They found no significant differences in preparation methods regarding grammatical errors of

capitalization, spelling, and vague adverbs.

Analysis of writing errors revealed several significant differences. Computer written reports were significantly more readable than handwritten reports. However, computer written reports contained significantly more passive construction than did handwritten reports. Further, computer written reports contained significantly more trite expressions than did handwritten reports. Possible weaknesses in the design of this study included arbitrary completion ordering of handwritten and computer written report samples, as well as subjective measurements of quality evaluations.

Pearce and Barker concluded in part from the mixed results that teacher training and expertise may be a primary factor in the pursuit of higher quality writing. They pointed to the need for objective assessment instruments for the "building blocks of writing quality" (Pearce & Barker, 1991, p. 150).

Limaye (1983) analyzed two letters of persuasion written in the late 16th century. These letters contained rhetorical elements and sequences similar to those advised by most modern business communication experts. Essentially, the modern experts were found to support an "attention -- interest -- desire -- action"

structure. The early letters differed most in their early mention of the particular favor being requested. In spite of this apparent violation of modern persuasion theory, both letters quickly re-focused on gentle prodding, and avoided dwelling on the actual requests.

In addition to making the aforementioned comparison, Limaye looked for syntactic patterns that were consistent with the modern advice on persuasive requests. The grammatical structures of the two letters subordinated the actual favor. Instead, they fused "I" and "You" into the strong suggestion of an interpersonal relationship. Limaye related this and other factors to the use of syntax for negotiating favorable responses to requests. The two 16th century letters generally followed modern theory for establishing persuasive interaction.

Aalberts and Krajewski (1987) analyzed 35 business letters of favorable response to legitimate customer complaints. They compared the content of these claims adjustments to preparation guidelines in four contemporary business communication textbooks.

The analyzed adjustment letters differed from the textbook guidelines in terms of organization. The textbooks recommended a direct organizational plan that begins with the good news of an adjustment for the

customer. However, only two (6%) of the analyzed letters contained this good news in the opening paragraph.

The textbooks advised that a company at fault should admit its mistake frankly, while maintaining positive language that minimizes recall of the negative situation to the customer's mind. Although the majority of the analyzed letters included an admission of fault, roughly one third of them omitted such a statement.

Goodin and Swerdlow (1987) performed a quality analysis of written correspondence in 13 organizational categories, one of which was banking services. A total of 60 letters and memorandums was selected from each category. Analysis was intended to identify major areas of deficiencies that constituted more of a problem in certain organizational categories than in others. Banking services had the fourth lowest deficiency percentage among the 13 organizational categories in the area called "form" (average of components including date, inside address, attention line, salutation, subject line, complimentary close, signature line, vertical spacing, horizontal spacing, and typos/spelling).

In the area called "grammar," banking services had the second lowest deficiency percentage. This area included punctuation, capitalization, number usage,

abbreviations, subject/verb agreement, antecedent of pronoun, adjective overuse, word usage, plural/possessive, fragments, run-on, tense, pronoun overuse, parallelism, sentence construction, and improper paragraphing.

Banking services was one of several organizational categories in which no "content" or "sequencing" deficiencies were detected. However, in the area called "style," banking services had considerably lower comparative success. It had the fourth highest deficiency percentage among the 13 organizational categories. This area included unfriendly tone, negative terminology, jargon-slang, overused terminology, lacking documentation, poor transitory expressions, legalese, lacking conciseness, lacking preciseness, condescending statements, misleading information, using "it/there" incorrectly, active/passive sentences, and sexist language.

Overall, banking services had the eighth highest deficiency percentage. Hospitality, insurance, government, health services, service organizations, manufacturing, and utilities had greater deficiencies. Mass media, education, real estate, and retail organizations had lesser deficiencies. "Style" deficiencies were the primary detriment to banking services' writing quality.

Salerno (1988) critiqued common notions about

opening buffers (statements aimed at preparing one for unfavorable news) in negative messages. He used a descriptive analysis of 22 job rejection letters to support a contention that recipients may become overly conditioned to a standard structural technique; namely, "buffer; rejection; reason; goodwill closing." The conditioning can take the form of complacency and result in loss of the "functional communicative effects" intended by the writer (Salerno, 1988, p. 45).

Salerno encourages writer sensitivity to the likely expectations of individual recipients in formulating or omitting an opening buffer to negative messages. He suggests three considerations for writing such messages: (a) becoming aware of audience uniqueness; (b) taking on a recipient's perspective; and (c) invoking, rather than manipulating, the audience.

#### Summary of Writing Assessment Studies

The Goodin and Swerdlow quality analysis study is quite germane to the present research. It used actual organizational correspondence, and assessed a broad range of technical and composition aspects. However, as in the other aforementioned studies, it does not consider writer perceptions of difficulty regarding the assessed aspects.

The studies offered a number of strategies and techniques for business writing improvement. They should, however, be considered in conjunction with their scope. For example, the study on nominal compounds included neither a range of writing aspects nor assessments of participant-generated correspondence.

#### Studies Combining Writing Perceptions and Assessments

The fifth and sixth questions put forth for investigation in this research were stated as follows:

5. How does perceived difficulty in composition aspects of letter writing relate to composition deficiencies that exist in the letters of bankers?
6. How does perceived difficulty in technical aspects of letter writing relate to technical deficiencies that exist in the letters of bankers?

#### Major Theme

This section examines business writing concerning school-to-workplace transitions within individual studies.

#### Pertinent Findings

Kilpatrick (1984) used questionnaires from 66 respondents, along with 68 sample letters supplied by

the respondents, to help determine their international business correspondence practices. The respondents represented a wide range of business categories. Their consensus views on international correspondence included a focus on clear, simple, and precise language; a minimizing of format distinctions between foreign and domestic business letter format; and a desire that international skills be included in college business communication courses.

Analysis of the 68 letters (32 routed foreign to American companies; 36 routed American to foreign companies) revealed that American-originated letters were generally less formal and more personal in writing style. Most of the other differences related to basic letter style (layout); and particulars such as date-lines, salutations, and complimentary closings.

Johnson and Sterkel (1984) examined attitudes of students (exact number not disclosed) toward the use of computer text analysis programs in their business writing course. Attitude surveys administered at the semester's beginning and end revealed a higher tendency to agree on the following items:

1. My writing skills have improved more from computer text analysis than they would have without the analysis.
2. The suggestions for revision on the computer print-

out are accurate at least 90% of the time.

3. The comments on the computer printout are easy to understand.

4. Using a computer for text analysis does not make me nervous.

5. Learning to use the editing features of the terminals is easy.

6. Using computer text analysis is an enjoyable experience.

7. I would look forward to another business writing course if computer analysis were used.

8. I will recommend to my friends that they take a business writing course that features computer text analysis.

Students were less inclined to agree at on the following attitude survey items at the semester's end:

1. I learn more from the comments on the computer printout than I learn from the comments a teacher writes on my paper.

2. I am less offended receiving criticism from a computer than I am receiving it from a teacher (Johnson & Sterkel, 1984, p. 35).

Programs used by the students to analyze their texts included 10 programs created by Bell Telephone

Laboratories, and 2 developed by Johnson and Sterkel themselves. These programs were designed to point out weaknesses in the following areas:

1. Diction: wordy phrases or unnecessarily long words
2. Suggest: omit phrases or words, or suggest a shorter version
3. Findbe: weak verbs of being
4. Unspecific: percentage and listing of unspecific words; specific suggestions given
5. Spelling: any words not in program's dictionary
6. Check: confusing words and meanings suggested for editing
7. Punctuation: count for quotations, parentheses (odd number an error indication); missing capitals at sentence beginning
8. Grammar: split infinitives
9. Prose: readability; variation; sentence structure
10. Style: average sentence and word length; number of words in longest and shortest sentences; percentage of nominalizations
11. Abstract: percentage of abstract words; prompt for excess percentage; list of the words
12. Tone: negative words identified for possible substitution of more positive words by user

Johnson and Sterkel cited increased self-help and

added excitement in writing as strengths of the computer programs in improving business students' writing skills. They felt that business organizations and schools alike would increasingly adopt such aids for document preparation and training purposes.

Varner and Grogg (1988) studied the effects of word processing use upon business report writing students' anxiety toward writing, time spent on writing, and writing quality. Two instructors of a business report writing course each taught one experimental and one control group. The 40 students comprising experimental groups performed all report writing--including initial drafts--on a word processor. The 48 students comprising control groups wrote reports with pen and paper before preparing a typed final copy. All students took writing anxiety pretests and posttests. They also kept logs for time spent on outlining, rough drafting, editing, and typing.

Analysis using t-tests and step-wise multiple regression revealed no significant difference between the experimental and control groups from pretest to posttest in writing anxiety levels. Time spent on certain writing assignments was significantly less for the experimental group. Overall, the experimental group

spent more time editing but less time on the total report assignments. No significant differences in writing quality were attributed to group assignment. Rather, performance in early-semester assignments was the best predictor of final report scores.

Varner and Grogg recommended additional study on microcomputer use as a writing tool. They also recognized a need for writing instruction that might affect the average or below average student more substantially.

#### Summary of Joint Perception/Assessment Studies

The perceptual aspects of these studies focused on instructional techniques. However, existing research does not address the combining of aspect difficulty perceptions of letter writers with actual assessments of similar aspects in their work samples.

#### Aggregate Summary and Critique

Studies in the area of business correspondence relate common themes in terms of purpose. They employ similar methodology in the general sense. However, their identification and emphasis of specific criteria for data analysis are noticeably divergent. Assessments of writing quality in workplace situations are far less prevalent than are attitudinal surveys. Consequently,

it is not surprising that approaches combining attitudes with assessment of actual writing are rarely found.

The difficulty in generalizing findings from studies in business correspondence seems attributable to human and situational factors. Business letter writers must constantly adjust to differences in perceived reader-audiences. In spite of the progress achieved in formulating basic conventions for letter writing, the assumption of "blank slate" mental openness in one's approach to letter origination has to be respected. Further, the contexts giving rise to composition of individual letters are excluded from consideration in most studies. Rather, attempts are made to obtain self-reports on how letter originators generally perceive various indicators of situational factors.

Collectively, the studies reveal discernible patterns in several areas. Findings confirm the considerable importance that business professionals attach to writing competence. Certain aspects, such as conciseness, are repeatedly cited as desirable in business writing. The studies often recommend that academic instruction in business writing be more closely adapted to workplace expectations and requirements. A comparative critique of the research suggests that students of business correspondence benefit from the instruction or

training received. Yet the instruction is often questioned in terms of strategy, the focus and emphasis of textual materials, and success in preparing employees for the actual demands and challenges of business writing.

The studies have addressed origination of business correspondence, typically utilizing either a survey of groups involved with writing or an analysis of completed letters. This raises the question of possible outcomes when the two approaches are combined in relation to a work setting. Within the current study, letter writers' perceptions of difficulties with composition and technical aspects of letter writing on the job are compared with an actual analysis of the composition and technical deficiencies in letters they produce. Outcomes will add to the existing body of research knowledge concerning the letter writing process.

CHAPTER 3  
PROCEDURES

This section specifies the data sources, collection, and analysis methods in conjunction with questions that comprise the study's problem statement.

The study puts forth the following questions for investigation:

1. Which composition aspects of writing external letters do bankers perceive as difficult?
2. Which technical aspects of writing external letters do bankers perceive as difficult?
3. What composition deficiencies exist in the external letters of bankers?
4. What technical deficiencies exist in the external letters of bankers?
5. How does perceived difficulty in composition aspects of letter writing relate to composition deficiencies that exist in the letters of bankers?
6. How does perceived difficulty in technical aspects of letter writing relate to technical deficiencies that exist in the letters of bankers?

The Setting

Bankers participating in the study were employed at branch locations within an area of metropolitan Char-

lotte, North Carolina. The branch banks lie within a 20-mile driving distance extending from eastern Charlotte, through a portion of southeastern Mecklenburg County, and into western Union County. The branch banks are situated along or near East Independence Boulevard (Highway 74), one of the most heavily traveled thoroughfares in the state. Other primary towns within the setting are Matthews, in Mecklenburg county; and Monroe, in Union County.

The city of Charlotte, with a population in excess of 420,000, is a major center of banking activity in the southeastern United States. It contains the corporate headquarters of NationsBank, recently ranked 4th among American banks in total assets; and First Union National Bank, recently ranked 11th. Wachovia Bank and Trust, recently ranked 21st nationally, has headquarters in nearby Winston-Salem and is well represented in the greater Charlotte area. A number of smaller banks have established niches in and around Charlotte. This regional vibrancy in banking has accompanied generally favorable economic and residency growth. Approximately 5.4 million people live within a 100-mile radius of Charlotte.

### Participants in the Study

The study involved two types of input from bankers: responses regarding perceived difficulty of composition and technical aspects of business letter writing; and submission of sample letters they had originated on the job. An expert panel of postsecondary business communication instructors was chosen to screen the sample letters for composition deficiencies.

#### Selection of Respondents

Due to the descriptive nature of this study, the requirements to be met by those providing information, and the relatively small number of participants sought, random selection was not deemed necessary. Rather, potential candidates within the aforementioned setting were screened in brief personal interviews. As part of the interview, candidates were provided a letter describing their participation. The letter is found in Appendix A. Fifteen interviewed bankers who satisfied the following conditions were included in the study:

- (1) They had recently originated external business letters consisting of both direct and indirect formats.
- (2) They agreed to submit copies of four such letters--two of each format--for analysis.
- (3) They agreed to complete survey instruments dealing

with the subject of business letter writing, following submission of the four letters.

One or two bankers from branch locations of the following banks were included in the study: American Commercial Savings Bank; Bank of Union; Branch Bank & Trust; First Charlotte Bank; First Citizens Bank; First Union National Bank; NationsBank; Security Bank; United Carolina Bank; and Wachovia Bank and Trust.

As a precaution against biasing bankers' selection of previously written letters for submission, specific information regarding the survey instruments was withheld pending receipt of their letters for screening. They were told, however, that the instruments would deal with the subject of letter writing; could be completed in less than an hour; and would not require extended written responses.

#### Selection of Letter Screening Panel

Part of this study involves letter screening by an independent panel of experts, consisting of postsecondary business communication instructors. A series of targeted contacts led to interviews of prospective members. As part of the interview, prospective panelists were provided a letter describing their participation. The letter is found in Appendix B. Six instruc-

tors who satisfied the following conditions were selected for the screening panel:

1. They regularly teach classes in business communications; and have included theory and practice in letter writing as part of the course.
2. They agreed to screen 10 external business letters for composition deficiencies.

Each member of the screening panel received 10 letters randomly assigned from the 60-letter pool. Each panelist independently screened his or her letters. The random assignment of letters per banker is shown in Table 3.

### Data Collection and Interpretation

The study places emphasis on descriptive interpretation of each collected data segment pertaining to the stated research questions.

#### Perceptions of Letter Writing Difficulties

For the first and second research questions, data were collected that investigated bankers' perceptions of difficulties in the letter writing process. The research questions are:

1. Which composition aspects of writing external letters do bankers perceive as difficult?

Table 3

Random Assignment of Bankers' Letters to Screening Panelists

---

Panelist 1

One letter assigned from:

Bankers A, C, G, H, I, J, K, and M

Two letters assigned from:

Banker O

---

Panelist 2

One letter assigned from:

Bankers D and H

Two letters assigned from:

Bankers B, J, L, and N

---

Panelist 3

One letter assigned from:

Bankers C, D, E, F, G, I, M, and O

Two letters assigned from:

Banker K

---

Panelist 4

One letter assigned from:

Bankers C, D, E, G, H, L, N, and O

Two letters assigned from:

Banker F

---

Panelist 5

One letter assigned from:

Bankers A, B, D, E, I, J, L, and N

Two letters assigned from:

Banker M.

---

Panelist 6

One letter assigned from:

Bankers B, C, E, F, G, H, I, and K

Two letters assigned from:

Banker A

---

2. Which technical aspects of writing external letters do bankers perceive as difficult?

Data Collection Instruments. Fifteen bankers completed two Q-sorts designed to indicate perceived difficulty of composition and technical aspects of business letter writing.

A Q-sort technique was used to ascertain the difficulties of aspects in the external letter writing process as perceived by the bankers. Each participant sorted two separate collections of 40 cards each. Each of the cards contained an item referring to a distinct composition or technical aspect of business letter writing.

Q-sort methodology offered several advantages to this study in terms of data collection. The Q-sort technique is a method of ordering items. The number of items used in a Q-sort relates to both convenience and statistical reliability. Kerlinger (1973) placed the optimum number of items in the 60 to 90 range; but noted success in the use of 40-item Q-sorts. The relative flexibility in item quantity permitted more meaningful consideration of the items to display within this study. The formation of 2 separate 40-item Q-sorts--one representing composition writing aspects, and the other

representing technical writing aspects--provided greater benefit to the research design than the retention of all items in a single Q-sort.

Q-sorts may be structured to test underlying theories, and administered under varying conditions or to differentiated groups. According to Stephenson (1953, p. 16), "they would be used to experiment upon certain attitudes of mind of any person we cared to make the subject of inquiry."

So-called "unstructured" Q-sorts have commonly been used to represent item selection and analysis within a single domain (Kerlinger, 1973). This application of Q-sorting was sufficiently flexible to ascertain difficulty perceptions in external letter writing, and to relate that information with assessments of actual writing deficiencies in the respondents' external letters.

The content of Q-sort items can be adapted to data gathering requirements. Examples of object sets may include the likes of "statements, single words, phrases, pictures, musical compositions" (Kerlinger, 1973, p. 583). These object sets may represent "changes or differences in opinions or self-concept" or "differences in esthetic judgments and preferences" (Hillestad, 1977, p. 69). Likewise, the type of continuum upon which

items are sorted may vary according to research needs. The nature of, and purpose for, information sought in this study legitimized consideration of the Q-sort methodology.

The Q-sort technique is capable of appealing to respondents by providing interesting situations. It allows participants to compare a sizable number of items without the painstaking difficulty of simple ranking or the relative isolation of mutually exclusive Likert-type listings. At the same time, the technique is designed to force prioritization within preset limits. The researcher is allowed flexibility in setting such limits via sorting instructions (Kerlinger, 1973). As a result, respondents may be challenged to approach the sorting task with increased interest and thoughtfulness.

Sorting was done according to perceived difficulty of each item in relation to others. Nine sorting bins were provided to each respondent. Pile 1 represented the least difficulty and Pile 9 represented the most difficulty. Although the same number of cards can be allowed for each pile, a quasi-normal forced distribution is considered more advantageous (Kerlinger, 1973). Numeric values were assigned to the piles, with most difficult items receiving a value of 8, and least difficult items receiving a value of 0. Thus, the following

array of item numbers and values was employed for each Q-sort:

	MOST DIFFICULT						LEAST DIFFICULT		
# of items	2	3	5	6	8	6	5	3	2
value	8	7	6	5	4	3	2	1	0

This is a rank-order continuum from most difficult to least difficult, with varying degrees of difficulty between the extremes. The number (#) of items represents the total number of cards to be placed in each bin by a respondent.

Participants were asked to sort and re-sort the cards until they had the prescribed number of cards in each pile. The complete set of instructions is found in Appendix C. The total number of cards in each collection, equivalent to the following percentages, represented the final sorting distribution.

- bin 1-- 5.0%
- bin 2-- 7.5%
- bin 3--12.5%
- bin 4--15.0%
- bin 5--20.0%
- bin 6--15.0%
- bin 7--12.5%
- bin 8-- 7.5%

rate the overall quality of this material--excellent, good, fair, or poor.

Sources of Q-Sort Items. Items for the Q-sort were selected by identifying, listing, and comparing composition and technical aspects contained in studies of business writing--particularly those reviewed in this study. Included in the selection process were items used by Adkins (1982), Aldrich (1982), Bennett and Olney (1986), Feinberg and Pritzker (1985), Goodin and Swerdlow (1987), Lemley (1983), Leonard and Gilsdorf (1990), Pearce and Barker (1991), and Storms (1983). To some extent, certain aspects within a given study bore similarity, proximity, or a propensity to overlap with others. This situation seems inherent in attempts to analyze writing difficulties. In this study, no attempt was made to artificially minimize or eliminate the incidence of items that may be perceived similarly. Rather, items were chosen with reduction of the more obscure and most nearly equivalent aspects in mind.

Composition aspects of business letter writing were presented and sorted separately from technical aspects. In the interest of unbiased presentation of items, the two Q-sorts were not labeled as composition or technical aspects. Rather, cards in the two Q-sorts were dis-

tinctly colored to prevent mixing of the two categories by participants. Composition items appeared on blue cards, and technical items were on pink cards. Table 4 contains a listing of the composition writing items used; Table 5 lists the technical items.

Interpretation of Findings. The 15 sets of participants' Q-sort values, representing each composition and technical item in the Q-sorts, were placed in separate tabular columns. A combined ranking, based on placement in Q-sort bins and accompanying point values, was compiled for each of the 40 composition items and 40 technical items. This provided factor arrays for expounding the impact of their magnitudes.

In dealing with identical point values within this or other ranking compilations in the study, the researcher averaged such ranks to conform with standard practice (Howell, 1987).

#### Existence of Letter Writing Deficiencies

For the third and fourth research questions, data were obtained from actual letters written by the bankers. The research questions are:

Question #3: What composition deficiencies exist in the external letters of bankers?

Question #4: What technical deficiencies exist in the

Table 4

Listing of Composition Writing Aspects

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1. clarity
  2. coherence
  3. completeness
  4. concluding the message
  5. concreteness
  6. condescending statements
  7. concise wording
  8. conflict resolution
  9. correctness
  10. demeaning expressions
  11. diplomacy/tact
  12. direct versus indirect approach
  13. emphasizing significant points
  14. ethical standards
  15. euphemisms
  16. good news conveyance
  17. idea sequencing
  18. information placement
  19. jargon
  20. justifying position
  21. legalese
  22. letter organizing/structuring
  23. logical focus and flow
  24. originality
  25. paragraph structure
  26. persuasion techniques
  27. positive terminology
  28. refusal conveyance
  29. relevant details
  30. responsibility acceptance
  31. sentence construction
  32. sexist language
  33. slang
  34. stating purpose
  35. tone
  36. transitional words/phrases
  37. trite expressions
  38. unfavorable news conveyance
  39. word usage in context
  40. "you" concept development
-

Table 5

Listing of Technical Writing Aspects, With Indication of  
Deficiency Assessment Method

---

- 1. abbreviations
- a 2. active voice (versus overuse of passive voice)  
in sentences
- 3. adherence to business letter format
- a 4. adverb usage
- 5. antecedents of pronouns
- a 6. apostrophe usage
- 7. article (a, an, the) usage
- 8. "between" versus "among"
- a 9. capitalization
- a10. cliches
- 11. colon usage
- 12. comma usage
- a13. comparatives (more, most) usage
- 14. dangling participle
- a15. double negatives
- a16. ellipsis mark usage
- a17. homonym usage
- a18. infinitives (split)
- 19. modifier usage
- a20. number representation
- 21. parallelism (faulty)
- 22. plural indication
- a23. possessive indication
- a24. preposition usage
- a25. pronoun usage

(table continues)

Table 5 (continued)

Listing of Technical Writing Aspects, With Indication of  
Deficiency Assessment Method

---

- 26. proofreading
  - a27. punctuation at end of sentence
  - a28. quotation mark placement at end of sentence
  - a29. readability levels
  - a30. redundancy/repetitiveness
    - 31. run-on sentence
    - 32. semicolon usage
  - a33. sentence fragments (incomplete)
    - 34. sentence syntax
    - 35. singular/plural agreement
  - a36. spelling
  - a37. subject/verb agreement
    - 38. tense usage
  - a39. unbalanced pairs (quotation, parenthesis, brace, bracket)
  - 40. wordiness (excessive)
- 

a Indicates items earmarked for detection by Grammatik IV, Version 2.0 software

Unmarked items earmarked for researcher detection in consultation with textual aids:  
Business Communication, 2nd edition, by Harcourt, Krizan, and Merrier (1991)  
Business Communications, 2nd edition, by Dumont and Lannon (1987)  
Business Communication: Strategies and Skills, 4th edition, by Huseman, Lahiff, and Penrose (1991).

external letters of bankers?

Data Collection Instrument. The same 15 bankers who participated in the Q-sorts each provided a sample of four external business letters that they originated. Two letters from each of two broadly characterized letter types--direct and indirect--were included in each writer's sample. Thus, a total of 60 letters were collected for screening.

The bankers were asked to choose from external letters they had most recently originated for submission. Letters exceeding two pages in length were excluded from selection. To maintain confidentiality, certain proper names or other sensitive information could be stricken or substituted by participants.

Composition Deficiencies. Six postsecondary instructors of business communication each independently screened composition quality aspects of 10 sample letters. The collected letters of bankers were assigned representative numbers, 1 through 60. The numbers were then randomly drawn and assigned to the 6 instructors. Thus, 10 letters were randomly assigned to each instructor for screening.

The instructors were directed to carefully screen

each letter, and to note--via a checklist of the 40 composition aspects used in the Q-sort--any aspects they considered deficient within each letter. A separate checklist column was used for each sample letter. Appendix E contains a set of instructions and assessment forms. Although all composition aspects on the checklist could potentially be detected within a completed letter, the absence of a particular aspect would not necessarily indicate a deficiency.

A few days following distribution of the bankers' letters to the panelists, a memorandum restating the requested completion date and providing for a postage-paid response was sent. Appendix F contains this memorandum.

Interpretation of Findings (Composition Deficiencies). Following collection of composition deficiency tally sheets for the 60 letters, the sheets were re-sorted according to originating bankers. These 15 sets of deficiency tallies were combined and listed in tabular columns according to the 40 composition items.

Composition deficiency tallies from the instructors' screenings of the 60 sample letters were combined. A rank ordering by frequency of occurrence (limited to 1 deficiency per composition aspect in a single letter) was compiled for the 40 composition items. The impact

of composition aspect frequencies was expounded.

Technical Deficiencies. Business letter samples received from the participating bankers were transcribed through word processing software onto a computer disk. Grammatik IV, Version 2.0 software was engaged to assist in signaling deficiencies. This grammar checker was rated number one by InfoWorld (Lombardi, 1991) in the Disk Operating System category, with high ratings in error recognition and editing capabilities.

The existence of deficiencies flagged by the software was verified by re-examination of the original letters. The researcher further screened each letter for technical deficiencies that could not be detected or affirmed by the grammar checker. These additional technical deficiencies were verified in consultation with guidelines set forth within three business communication textbooks: Business Communication, 2nd edition, by Harcourt, Krizan, and Merrier (1991); Business Communications, 2nd edition, by Dumont and Lannon (1987); and Business Communication: Strategies and Skills, 4th edition, by Huseman, Lahiff, and Penrose (1991). A composite checklist, based on the 40-item Q-Sort for technical writing aspects, was used to combine software-screened and researcher-screened technical deficiencies

for each letter.

Interpretation of Findings (Technical Deficiencies). Following software-assisted/researcher screenings of the 60 letters, tabular columns were used to combine and list technical deficiencies of the fifteen bankers' samples according to the 40 technical items.

Technical deficiency tallies from the software-assisted/researcher screenings of the 60 sample letters were combined. A rank ordering by frequency of occurrence (limited to 1 deficiency per technical aspect in a single letter) was compiled for the 40 technical items. The impact of technical aspect frequencies was expounded.

#### Analysis of Data

Descriptive interpretations of the data from research questions involving data collection were integrally linked with analyses of relationships between writing perceptions and writing deficiencies. Thus, the fifth and sixth research questions were addressed.

These questions are:

Question #5: How does perceived difficulty in composition aspects of letter writing relate to composition deficiencies that exist in the letters of bankers?

Question #6: How does perceived difficulty in technical

aspects of letter writing relate to technical deficiencies that exist in the letters of bankers?

#### Composition Difficulties and Deficiencies

Combined point ratings from the Q-sort composition difficulty items were compared with the combined instructor-screened composition deficiencies in the sample letters. The impact of jointly examined composition aspect magnitudes and frequencies was analyzed. The rank-ordered composition deficiency totals were related to the combined rankings of perceived composition difficulties through the use of percentile rank and descriptive comparisons. The extent of similarities, or differences, between composition difficulty and deficiency rankings was determined.

#### Technical Difficulties and Deficiencies

Combined point ratings from the Q-sort technical difficulty items were compared with combined software/researcher-screened technical deficiencies in the sample letters. The impact of jointly examined technical aspect magnitudes and frequencies was analyzed. The rank-ordered technical deficiency totals were related to the combined ranking of perceived technical difficulties through the use of percentile rank

and descriptive comparisons. The extent of similarities, or differences, between technical difficulty and deficiency rankings was determined.

## CHAPTER 4

### FINDINGS

Individuals representing 10 banks participated in the study. They included two bankers from Bank of Union, Branch Bank and Trust, NationsBank, Security Bank, and Wachovia Bank and Trust. In addition, one banker from American Commercial Savings Bank, First Charlotte Bank, First Citizens Bank, First Union National Bank, and United Carolina Bank participated.

Job titles of the participating bankers included the following: Personal Banker; Vice President/City Manager; Branch Manager; Vice President; City Executive; Customer Service Representative; Banking Representative; Banker; Vice President/Retail Banking Manager; Customer Sales Representative; Assistant Vice President; Assistant Vice President/Branch Manager; and Mortgage Loan Specialist.

The work experience of participating bankers ranged from 4 to 27 years, with a median of 9 years. One banker had earned a master's degree; 10 others had bachelor's degrees; two had an associate degree; one had a single-year post-secondary certificate; and one had no formal education beyond high school.

The bankers initially participated by submitting

four self-authored external letters. The topical areas of these letters reflected the general scope of the bankers' job duties. Topics included servicing customer accounts; processing loans; confirming transactions and agreements; responding to inquiries or complaints; facilitating bank branch operations; pursuing solutions to debtor defaults; and following up prior meetings with current or prospective clients, with an emphasis on goodwill for continued relations.

Prior to performing the Q-sort process, the bankers responded to a brief survey designed to identify instruction and training support in letter writing.

The majority of bankers received some scholastic experience in business letter writing. To the question, "Did you receive any scholastic instruction in business letter writing?" 4 bankers answered no. The 11 bankers who answered yes rated the overall quality of this instruction. Two bankers rated it as excellent; 5 rated it as good; 3 rated it as fair; and 1 rated it as poor. The 11 bankers named the following courses as those in which they had received letter writing instruction. One banker listed two courses; thus, the number totals 12.

High school English (1 banker)

Clerk-typist technical school (1 banker)

Business college, 1-year course (1 banker)

Freshman English in college (4 bankers)

Business communications course, collegiate level (3 bankers)

Business case studies/report writing course, collegiate level (2 bankers)

English composition courses were an important source of such instruction where business communication courses or special units from other business courses were lacking.

The majority of the bankers had received no formal job training in business letter writing. To the question, "As a banker, have you received any formal training in business letter writing?" 13 bankers answered no. Only 2 bankers answered yes. They both rated the overall quality of their training as good. One banker reported having received 8 hours in such training. The other banker reported a training time of 2 hours.

Roughly half of the bankers were provided reference material concerning business letter writing. To the question, "Does your employer provide you with reference material concerning business letter writing?" 7 bankers answered no. Of the 8 bankers who replied yes, 6 rated the overall quality of their reference material as good, and 2 rated it as fair.

All bankers received a kit consisting of 9 Q-sort-

ing bins; 2 sets of cards representing technical and composition writing aspects; and a list of sorting instructions. Two other bankers previously completed the instrument for field testing purposes. They reported no difficulties with the instructions, and a completion time of under 45 minutes.

All bankers retained their kits for two days or longer. Thereafter, they submitted their sorted cards to the researcher.

#### Perceived Composition Difficulties

Research Question 1 asks the following: Which composition aspects of writing external letters do bankers perceive as difficult?

The blue-colored Q-sort cards represented composition aspects pertaining to business letter writing. Bankers were asked to consider the difficulty of each aspect in relation to others in the set. In effect, they were to determine how much of a problem particular aspects presented to them in writing business letters. The sorting bins represented a continuum of aspect difficulty. The closer to the top bin a card item was placed, the more difficult it was perceived to be. Conversely, the closer to the bottom bin a card item was placed, the less difficult it was perceived to be. Card

items placed in the center bin represented the midrange of difficulty perception.

As Table 6 indicates, bankers rated the following 10 composition aspects highest in difficulty (from most difficult to less difficult):

legalese; persuasion techniques (tie)  
refusal conveyance  
unfavorable news conveyance  
conflict resolution; direct versus indirect approach  
(tie)  
logical focus and flow  
idea sequencing  
euphemisms  
transitional words, phrases

Bankers rated the following 10 composition aspects lowest in difficulty (from least difficult to more difficult):

good news conveyance  
stating purpose  
letter organizing, structuring  
slang  
sentence construction  
gender bias in language  
concluding the message  
emphasizing significant points  
clarity  
ethical standards

### Perceived Technical Difficulties

Research Question 2 asks the following: Which technical aspects of writing external letters do bankers perceive as difficult?

The pink-colored Q-sort cards represented technical

Table 6

Q-Sort Rankings of Perceived Composition Aspect  
Difficulties

Point Total	Composition Aspect	Difficulty Rank
85	legalese	1.5
85	persuasion techniques	1.5
84	refusal conveyance	3
83	unfavorable news conveyance	4
77	conflict resolution	5.5
77	direct versus indirect approach	5.5
75	logical focus and flow	7
74	idea sequencing	8
70	euphemisms	9
68	transitional words, phrases	10
65	concise wording	11.5
65	originality	11.5
64	condescending statements	13.5
64	justifying position	13.5
63	correctness	16
63	information placement	16
63	tone	16
62	"you" concept development	18
61	word usage in context	19
60	demeaning expressions	20.5
60	diplomacy/tact	20.5

(table continues)

Table 6 (continued)

Q-Sort Rankings of Perceived Composition Aspect Difficulties

Point Total	Composition Aspect	Difficulty Rank
59	paragraph structure	22
58	relevant details	23
57	concreteness	24
55	coherence	25
54	responsibility acceptance	26
53	completeness	28.5
53	jargon	28.5
53	positive versus negative terminology	28.5
53	trite expressions	28.5
52	ethical standards	31
51	clarity	32
48	emphasizing significant points	33
47	concluding the message	34
45	gender bias in language	35
44	sentence construction	36
43	slang	37
41	letter organizing, structuring	38
35	stating purpose	39
31	good news conveyance	40

aspects pertaining to business letter writing. The Q-sort instrument was set up so that these technical aspects were considered and sorted apart from the composition aspects. However, the sorting procedures were identical. Bankers were to consider the difficulty of each technical aspect in relation to others in the set. The sorting would indicate how much of a problem they perceived particular aspects to be in writing business letters.

As Table 7 indicates, bankers perceived the following 10 technical aspects as highest in difficulty (from most difficult to less difficult):

- infinitives (split)
- sentence syntax
- antecedents of pronouns
- wordiness (excessive)
- dangling participle
- preposition usage
- comparatives (more, most) usage; parallelism (faulty);  
semicolon usage (tie)
- ellipsis mark usage

Bankers rated the following 10 technical aspects lowest in difficulty (from least difficult to more difficult):

- capitalization
- punctuation at end of sentence
- adherence to business letter format
- quotation mark placement at end of sentence; article (a, an, the) usage (tie)
- number representation
- abbreviations
- spelling; proofreading; pronoun usage (tie)

Table 7

Q-Sort Rankings of Perceived Technical Aspect  
Difficulties

Point Total	Technical Aspect	Difficulty Rank
84	infinitives (split)	1
83	sentence syntax	2
81	antecedents of pronouns	3
80	wordiness (excessive)	4
78	dangling participle	5
77	preposition usage	6
74	comparatives (more, most) usage	8
74	parallelism (faulty)	8
74	semicolon usage	8
73	ellipsis mark usage	10
71	modifier usage	11
70	active voice (versus overuse of passive voice) in sentences	12.5
70	redundancy/repetitiveness	12.5
63	adverb usage	15.5
63	colon usage	15.5
63	comma usage	15.5
63	homonym usage	15.5
61	"between" versus "among"	18.5
61	subject/verb agreement	18.5

(table continues)

Table 7 (continued)

Q-Sort Rankings of Perceived Technical Aspect  
Difficulties

Point Total	Technical Aspect	Difficulty Rank
60	apostrophe usage	21.5
60	run-on sentence	21.5
60	tense usage	21.5
60	unbalanced pairs (quotation, parenthesis, brace, bracket)	21.5
59	possessive indication	24.5
59	readability (appropriate level)	24.5
58	singular/plural agreement	26
55	cliches	27
53	sentence fragments (incomplete)	28
52	plural indication	29
49	double negatives	30
48	pronoun usage	32
48	proofreading	32
48	spelling	32
47	abbreviations	34
45	number representation	35
43	article (a, an, the) usage	36.5
43	quotation mark placement at end of sentence	36.5
32	adherence to business letter format	38
26	punctuation at end of sentence	39
25	capitalization	40

### Assessed Composition Deficiencies

Research Question 3 asks the following: What composition deficiencies exist in the external letters of bankers?

An expert panel, consisting of six postsecondary business communication instructors, screened the sample letters for composition deficiencies. All panelists had several years' teaching experience in the discipline. Two-thirds of the panelists had attained a terminal academic degree. All panelists had prior experience in business communications consulting, text reviewing, or article publishing.

Each panelist was instructed to evaluate the assigned letters; and, using a checklist of 40 composition aspects, judge whether each aspect was in some way deficient in a letter. A deficiency could apply either to the entire letter or any part of it. By check marking an aspect, the panelist indicated that the letter aspect fell at least somewhat short of the standard he or she would recommend. By leaving an aspect blank, the panelist indicated that it met his or her recommended standard, or was not applicable to the letter. Panelists were asked to treat all letter contents confidentially.

The expert panel assessed a total of 587 composition deficiencies in the 60 screened letters. This represents an average of slightly less than 10 composition deficiencies per letter. On average, each letter was found deficient in 24.5% of the 40 listed composition aspects. The number of assessed composition deficiencies in a single letter ranged from 0 to 23. The letters averaged 176 words within the body, or paragraph, sections. The letters averaged 176 words in length within the paragraph section, or body. They ranged from 55 to 646 words in length.

As Table 8 indicates, the following 11 composition deficiencies were most often found in bankers' letters (from most frequent to less frequent):

- concise wording
- correctness
- sentence construction
- clarity; letter organizing, structuring; paragraph structure (tie)
- information placement; transitional words, phrases (tie)
- coherence; emphasizing significant points; trite expressions (tie)

The following 10 composition deficiencies were least often found in bankers' letters (from least frequent to more frequent):

- ethical standards
- slang; refusal conveyance; euphemisms (tie)
- good news conveyance
- responsibility acceptance
- gender bias in language; direct versus indirect approach (tie)

Table 8

Rankings of Assessed Composition Aspect Deficiencies

Point Total	Composition Aspect	Deficiency Rank
39	concise wording	1
34	correctness	2
29	sentence construction	3
25	clarity	5
25	letter organizing, structuring	5
25	paragraph structure	5
24	information placement	7.5
24	transitional words, phrases	7.5
20	coherence	10
20	emphasizing significant points	10
20	trite expressions	10
19	"you" concept development	12
18	completeness	14
18	concreteness	14
18	condescending statements	14
16	concluding the message	17.5
16	jargon	17.5
16	relevant details	17.5
16	tone	17.5

(table continues)

Table 8 (continued)

Rankings of Assessed Composition Aspect Deficiencies

Point Total	Composition Aspect	Deficiency Rank
15	diplomacy/tact	21
15	idea sequencing	21
15	logical focus and flow	21
13	stating purpose	23
12	word usage in context	24
11	originality	25
10	justifying position	27
10	persuasion techniques	27
10	positive versus negative terminology	27
9	legalese	29.5
9	unfavorable news conveyance	29.5
8	conflict resolution	31.5
8	demeaning expressions	31.5
5	direct versus indirect approach	33.5
5	gender bias in language	33.5
4	responsibility acceptance	35
3	good news conveyance	36
1	euphemisms	38
1	refusal conveyance	38
1	slang	38
0	ethical standards	40

demeaning expressions; conflict resolution (tie)

### Assessed Technical Deficiencies

Research Question 4 asks the following: What technical deficiencies exist in the external letters of bankers?

The researcher transcribed each collected letter onto a computer disk, and used Grammatik IV, Version 2.0 software to assist in screening for technical deficiencies. Three business communication textbooks were consulted for further screening of technical deficiencies that could not be detected or affirmed by the software. Visual re-examinations of original letters verified the existence of each cited deficiency.

A total of 313 technical deficiencies were assessed in the 60 screened letters. This represents an average of slightly more than 5 technical deficiencies per letter. On average, each letter was found deficient in 13% of the 40 listed composition aspects. The number of assessed technical deficiencies in a single letter ranged from 0 to 11.

As Table 9 indicates, the following 11 technical deficiencies were most often found in bankers' letters (from most frequent to less frequent):  
active voice (versus overuse of passive voice) in

Table 9

Rankings of Assessed Technical Aspect Deficiencies

Point Total	Technical Aspect	Deficiency Rank
28	active voice (versus overuse of passive voice) in sentences	2
28	sentence syntax	2
28	wordiness (excessive)	2
27	comma usage	4
13	pronoun usage	5.5
13	spelling	5.5
12	antecedents of pronouns	8
12	number representation	8
12	redundancy/repetitiveness	8
11	modifier usage	10.5
11	singular/plural agreement	10.5
10	cliches	12
9	article (a, an, the) usage	13.5
9	semicolon usage	13.5
8	abbreviations	16
8	adverb usage	16
8	proofreading	16
7	run-on sentence	18
6	adherence to business letter format	20.5
6	readability (appropriate level)	20.5
6	sentence fragments (incomplete)	20.5
6	subject/verb agreement	20.5

(table continues)

Table 9 (continued)

Rankings of Assessed Technical Aspect Deficiencies

Point Total	Technical Aspect	Deficiency Rank
5	apostrophe usage	24.5
5	capitalization	24.5
5	preposition usage	24.5
5	punctuation at end of sentence	24.5
4	parallelism (faulty)	27
3	possessive indication	28
2	homonym usage	29.5
2	tense usage	29.5
1	comparatives (more, most) usage	32.5
1	dangling participle	32.5
1	ellipsis mark usage	32.5
1	unbalanced pairs (quotation, parenthesis, brace, bracket)	32.5
0	"between" versus "among"	37.5
0	colon usage	37.5
0	double negatives	37.5
0	infinitives (split)	37.5
0	plural indication	37.5
0	quotation mark placement at end of sentence	37.5

sentences; sentence syntax; wordiness (excessive)  
(tie)  
comma usage  
pronoun usage; spelling (tie)  
antecedents of pronouns; number representation;  
redundancy/repetitiveness (tie)  
modifier usage; singular/plural agreement (tie)

The following 10 technical deficiencies were least often found in bankers' letters (from least frequent to more frequent):

quotation mark placement at end of sentence; plural indication; infinitives (split); double negatives; colon usage; between" versus "among" (tie, none found)  
unbalanced pairs (quotation, parenthesis, brace, bracket); ellipsis mark usage; dangling participle; comparatives (more, most) usage (tie)

#### Comparison of Composition Difficulties and Composition Deficiencies

Research Question 5 asks the following: How does perceived difficulty in composition aspects of letter writing relate to composition deficiencies that exist in the letters of bankers?

The use of identical composition aspects for both perceived difficulties and assessed deficiencies provided a means of comparing the two. Percentiles for the two sets of rankings suggest the extent of similarities or differences between composition difficulties and deficiencies.

As Table 10 indicates, perceived difficulties bore

Table 10

Differences in Percentile Rankings of Perceived  
Composition Aspect Difficulties and Assessed Composition  
Aspect Deficiencies

Q-Sort Difficulty Percentile	Assessed Deficiency Percentile	Differ- ence	Composition Aspect
<hr/>			
Difference 50 or More; Perceived Difficulty Greater			
93	3	90	refusal conveyance
78	3	75	euphemisms
			direct versus indirect
85	15	70	approach
95	25	70	legalese
85	20	65	conflict resolution
95	30	65	persuasion techniques
			unfavorable news
90	25	65	conveyance
-----			
Difference 21 to 49; Perceived Difficulty Greater			
83	45	38	logical focus and flow
80	45	35	idea sequencing
65	30	35	justifying position
70	38	32	originality
48	20	28	demeaning expressions
23	0	23	ethical standards
35	13	22	responsibility acceptance
-----			
Difference 20 or Less			
53	40	13	word usage in context
8	3	5	slang
58	53	5	tone
48	45	3	diplomacy/tact
65	63	2	condescending statements
13	15	2	gender bias in language
			positive versus negative
25	30	5	terminology

(table continues)

Table 10 (continued)

Differences in Percentile Rankings of Perceived  
Composition Aspect Difficulties and Assessed Composition  
Aspect Deficiencies

Q-Sort Difficulty Percentile	Assessed Deficiency Percentile	Differ- ence	Composition Aspect
75	80	5	transitional words, phrase
0	10	10	good news conveyance
43	53	10	relevant details
55	70	15	"you" concept development
-----			
Difference 21 to 49; Assessed Deficiency Greater			
58	80	22	information placement
40	63	23	concreteness
70	98	28	concise wording
25	53	28	jargon
38	73	35	coherence
58	95	37	correctness
25	63	38	completeness
15	53	38	concluding the message
45	85	40	paragraph structure
3	43	40	stating purpose
25	73	48	trite expressions
-----			
Difference 50 or More; Assessed Deficiency Greater			
18	73	55	emphasizing significant points
20	85	65	clarity
5	85	80	letter organizing, structuring
10	93	83	sentence construction

Note. Percentiles represent the percentage obtained by dividing the number of lower ranked composition difficulty or deficiency aspects by the total number of aspects (40).

closest similarity to existing deficiencies in the following 10 composition aspects (from most similar to less similar):

condescending statements; gender bias in language (tie)  
diplomacy/tact  
positive versus negative terminology; slang; tone;  
transitional words, phrases (tie)  
good news conveyance; relevant details (tie)  
word usage in context

Within this group, assessed deficiencies exceeded perceived difficulty in the aspects of gender bias in language; positive versus negative terminology; transitional words, phrases; good news conveyance; and relevant details. Perceived difficulty exceeded assessed deficiencies in the remaining aspects.

Perceived difficulties differed most from assessed deficiencies in the following 10 composition aspects (from least similar to more similar):

refusal conveyance  
sentence construction  
letter organizing, structuring  
euphemisms  
direct versus indirect approach; legalese (tie)  
clarity; conflict resolution; persuasion techniques;  
unfavorable news conveyance (tie)

Within this group, assessed deficiencies exceeded perceived difficulty in the aspects of clarity; letter organizing, structuring; and sentence construction. Perceived difficulty exceeded assessed deficiencies in the remaining aspects.

Comparison of Technical Difficulties and  
Technical Deficiencies

Research Question 6 asks the following: How does perceived difficulty in technical aspects of letter writing relate to technical deficiencies that exist in the letters of bankers?

As Table 11 indicates, perceived difficulties bore closest similarity to existing deficiencies in the following 10 technical aspects (from most similar to less similar):

adverb usage; modifier usage (tie)  
sentence syntax  
wordiness (excessive)  
readability (appropriate level)  
apostrophe usage; subject/verb agreement; possessive indication; quotation mark placement at end of sentence (tie)  
redundancy/repetitiveness

Within this group, assessed deficiencies exceeded perceived difficulty in the aspects of readability (appropriate level); redundancy/repetitiveness; and wordiness (excessive). Assessed deficiencies and perceived difficulties ranked similarly in the aspects of adverb usage and modifier usage. Perceived difficulty exceeded assessed deficiencies in the remaining aspects.

Perceived difficulties differed most from existing deficiencies in the following 10 technical aspects (from

Table 11

Differences in Percentile Rankings of Perceived  
Technical Aspect Difficulties and Assessed Technical  
Aspect Deficiencies

Q-Sort Difficulty Percentile	Screened Deficiency Percentile	Differ- ence	Technical Aspect
<hr/>			
Difference 50 or More; Perceived Difficulty Greater			
98	0	98	infinitives (split)
88	15	73	dangling participle comparatives (more, most) usage
78	15	63	usage
75	15	60	ellipsis mark usage
58	0	58	colon usage
53	0	53	"between" versus "among"
85	35	50	preposition usage
<hr/>			
Difference 21 to 49; Perceived Difficulty Greater			
78	33	45	parallelism (faulty)
58	25	33	homonym usage unbalanced pairs (quotation, parenthesis, brace, bracket)
43	15	28	brace, bracket)
28	0	28	plural indication
25	0	25	double negatives
<hr/>			
Difference 20 or Less			
43	25	18	tense usage
93	78	15	antecedents of pronouns
78	65	13	semicolon usage quotation mark placement at end of sentence
8	0	8	at end of sentence
38	30	8	possessive indication
43	35	8	apostrophe usage
53	45	8	subject/verb agreement
95	93	2	sentence syntax
58	58	0	adverb usage
73	73	0	modifier usage
90	93	3	wordiness (excessive)

(table continues)

Table 11 (continued)

Differences in Percentile Rankings of Perceived  
Technical Aspect Difficulties and Assessed Technical  
Aspect Deficiencies

Q-Sort Difficulty Percentile	Screened Deficiency Percentile	Differ- ence	Technical Aspect
38	45	7	readability (appropriate level)
68	78	10	redundancy/repetitiveness
43	55	12	run-on sentence
30	45	15	sentence fragments (incomplete)
-----			
Difference 21 to 49; Assessed			Deficiency Greater
68	93	25	active voice (versus overuse of passive voice) in sentences
58	90	32	comma usage
3	35	32	punctuation at end of sentence
0	35	35	capitalization
33	70	37	cliches
35	73	38	singular/plural agreement
5	45	40	adherence to business letter format
18	58	40	proofreading
15	58	43	abbreviations
-----			
Difference 50 or More; Assessed			Deficiency Greater
8	65	57	article (a, an the) usage
13	78	65	number representation
18	85	67	pronoun usage
18	85	67	spelling

Note. Percentiles represent the percentage obtained by dividing the number of lower ranked technical difficulty or deficiency aspects by the total number of aspects (40).

least similar to more similar):

infinitives (split)  
dangling participle  
spelling; pronoun usage (tie)  
number representation  
comparatives (more, most) usage  
ellipsis mark usage  
colon usage  
article (a, an, the) usage  
"between" versus "among"

Within this group, assessed deficiencies exceeded perceived difficulty in the aspects of spelling, pronoun usage, number representation, and article (a, an, the) usage. Perceived difficulty exceeded assessed deficiencies in the remaining aspects.

## CHAPTER 5

### SUMMARY, CONCLUSIONS, RECOMMENDATIONS AND DISCUSSION, AND SUGGESTIONS FOR FURTHER RESEARCH

This summary pertains to the various questions put forward for investigation. It is based on the study's primary findings. The recommendations and discussion of the study are based on an analysis of primary and secondary research findings. Suggestions for further research stem from a comparison of previous studies to recommendations in the present study.

#### Summary

The study involved inquiry and assessment to reveal business letter writing problems within the workplace category of banking. First, it explored difficulties in letter writing that bankers perceived. Second, it investigated the relationship of bankers' difficulty perceptions to the nature and extent of deficiencies in external letters they had written.

The study put forth the following questions for investigation:

- (1) Which composition aspects of writing external letters do bankers perceive as difficult?
- (2) Which technical aspects of writing external letters

do bankers perceive as difficult?

(3) What composition deficiencies exist in the external letters of bankers?

(4) What technical deficiencies exist in the external letters of bankers?

(5) How does perceived difficulty in composition aspects of letter writing relate to composition deficiencies that exist in the letters of bankers?

(6) How does perceived difficulty in technical aspects of letter writing relate to technical deficiencies that exist in the letters of bankers?

In general, the study's findings may be summarized in the areas of perceived letter writing difficulties, assessed letter writing deficiencies, and bankers' access to instruction, training, and support in letter writing.

#### Perceived Letter Writing Difficulties

Fifteen bankers each completed two separate sorting exercises under similar Q-sort guidelines. Forty composition writing aspects were included in one set of Q-sort cards; and 40 technical writing aspects were included in the other set. The bankers performed their sorting on the basis of perceived difficulty, with nine Q-sort bins representing a continuum from most to least

difficult.

Composition difficulties. Bankers ranked the following 10 composition aspects highest in perceived difficulty (from most difficult to less difficult):

legalese; persuasion techniques (tie)  
refusal conveyance  
unfavorable news conveyance  
conflict resolution; direct versus indirect approach  
(tie)  
logical focus and flow  
idea sequencing  
euphemisms  
transitional words, phrases

Bankers ranked the following 10 composition aspects lowest in perceived difficulty (from least difficult to more difficult):

good news conveyance  
stating purpose  
letter organizing, structuring  
slang  
sentence construction  
gender bias in language  
concluding the message  
emphasizing significant points  
clarity  
ethical standards

Technical Difficulties. Bankers ranked the following 10 technical aspects highest in perceived difficulty (from most difficult to less difficult):

infinitives (split)  
sentence syntax  
antecedents of pronouns  
wordiness (excessive)  
dangling participle  
preposition usage  
comparatives (more, most) usage; parallelism (faulty);

semicolon usage (tie)  
ellipsis mark usage

Bankers ranked the following 10 technical aspects lowest in perceived difficulty (from least difficult to more difficult):

capitalization  
punctuation at end of sentence  
adherence to business letter format  
quotation mark placement at end of sentence; article (a, an, the) usage (tie)  
number representation  
abbreviations  
spelling; proofreading; pronoun usage (tie)

#### Assessed Letter Writing Deficiencies

A total of 900 deficiencies were assessed in the 60 letters submitted by 15 bankers. This represents an average of 15 deficiencies per letter. On average, each letter was found deficient in about 19% of the 80 aspects assessed. The letters averaged 176 words in length within the paragraph section, or body. They ranged from 55 to 646 words in length.

Composition Deficiencies. Based on assessment screening by a panel of postsecondary business communication instructors, bankers' letters averaged slightly under 10 composition deficiencies each--about 25% of the 40 aspects assessed. Panelists assessed the following 11 composition deficiencies most frequently in bankers' letters (from most frequent to less frequent):

concise wording  
correctness  
sentence construction  
clarity; letter organizing, structuring; paragraph  
structure (tie)  
information placement; transitional words, phrases (tie)  
coherence; emphasizing significant points; trite  
expressions (tie)

Panelists assessed the following 10 composition deficiencies least frequently in bankers' letters (from least frequent to more frequent):

ethical standards  
slang; refusal conveyance; euphemisms (tie)  
good news conveyance  
responsibility acceptance  
gender bias in language; direct versus indirect  
approach (tie)  
demeaning expressions; conflict resolution (tie)

Technical deficiencies. Based on the results of grammar checking software and researcher screening using textual references, bankers' letters averaged slightly over 5 technical deficiencies each--about 13% of the 40 aspects assessed. The following 11 technical deficiencies were most frequently assessed in bankers' letters (from most frequent to less frequent):

active voice (versus overuse of passive voice) in sentences; sentence syntax; wordiness (excessive) (tie)  
comma usage  
pronoun usage; spelling (tie)  
antecedents of pronouns; number representation; redundancy/repetitiveness (tie)  
modifier usage; singular/plural agreement (tie)

The software/researcher assessment found the following

10 technical deficiencies least frequently in bankers' letters (from least frequent to more frequent):

quotation mark placement at end of sentence; plural indication; infinitives (split); double negatives; colon usage; between" versus "among" (tie, none found) unbalanced pairs (quotation, parenthesis, brace, bracket); ellipsis mark usage; dangling participle; comparatives (more, most) usage (tie)

### Differences in Perceived Difficulties and Assessed Deficiencies

Based on a comparison of the percentile ranks of composition and technical letter writing aspects, certain aspects emerged as notably similar or different in terms of relating perceived difficulty to assessed deficiencies.

#### Composition Difficulties Versus Deficiencies.

Percentile rankings of perceived difficulties differed least from percentile rankings of existing deficiencies in the following 10 composition aspects (from most similar to less similar):

condescending statements; gender bias in language (tie) diplomacy/tact  
positive versus negative terminology; slang; tone; transitional words, phrases (tie)  
good news conveyance; relevant details (tie)  
word usage in context

Percentile rankings of perceived difficulties differed most from percentile rankings of assessed deficiencies in the following 10 composition aspects

(from least similar to more similar):

refusal conveyance  
sentence construction  
letter organizing, structuring  
euphemisms  
direct versus indirect approach; legalese (tie)  
clarity; conflict resolution; persuasion techniques;  
unfavorable news conveyance (tie)

Within this group, percentile ranks of assessed deficiencies exceeded percentile ranks of perceived difficulty in the aspects of clarity; letter organizing, structuring; and sentence construction. Perceived difficulty exceeded assessed deficiencies in the remaining aspects.

Technical Difficulties Versus Deficiencies. Percentile rankings of perceived difficulties differed least from rankings of existing deficiencies in the following 10 technical aspects (from most similar to less similar):

adverb usage; modifier usage (tie)  
sentence syntax  
wordiness (excessive)  
readability (appropriate level)  
apostrophe usage; subject/verb agreement; possessive indication; quotation mark placement at end of sentence (tie)  
redundancy/repetitiveness

Percentile rankings of perceived difficulties differed most from percentile rankings of existing deficiencies in the following 10 technical aspects (from

least similar to more similar):

infinitives (split)  
dangling participle  
spelling; pronoun usage (tie)  
number representation  
comparatives (more, most) usage  
ellipsis mark usage  
colon usage  
article (a, an, the) usage  
"between" versus "among"

Within this group, percentile ranks of assessed deficiencies exceeded percentile ranks of perceived difficulty in the aspects of abbreviations and article (a, an, the) usage. Percentile ranks of perceived difficulty exceeded percentile ranks of assessed deficiencies in the remaining aspects.

#### Training and Support for Bankers' Letter Writing Tasks

The majority of bankers had received some in-school experience in business letter writing. English composition courses were named as the source of such instruction when business communication courses or special units from other business courses were not available. The majority of the bankers had received no formal job training in business letter writing. The few who had received such training rated its quality as good (on a scale of excellent, good, fair, or poor). Roughly half of the bankers were provided reference material concerning business letter writing.

## Conclusions

Based on the study's findings, the researcher concludes the following concerning the participating bankers' perceived and assessed external letter writing problems:

1. The technical deficiency ratio of slightly over five per screened external letter--itself a source of legitimate concern--is accompanied by a composition deficiency ratio nearly twice as high. The resulting ratio of 15 writing aspect deficiencies per external letter is quite high, considering that external correspondence is expected to be free from technical errors; that the expert panel assessed one-fourth of the composition aspects as below their recommended standards; and that the deficiency compilations are non-repetitive. Further, these were relatively short letters, averaging 176 words.

2. The bankers' perceptions of difficulty concerning many aspects of external letter writing differ substantially from deficiencies assessed in the actual letters they write. Substantial differences exist in both composition and technical writing aspects. Thus, in many instances the bankers have not directed their concerns regarding writing effectiveness to their legit-

imate areas for improvement.

### Recommendations and Discussion

Based on the findings and conclusions of the present study, and the review of related studies, the following recommendations are offered:

1. Business educators should take perceptual differences between themselves and writers of business correspondence in the workplace into account in developing strategies for letter writing instruction.
  2. Instructional techniques for letter writing should have an emphasis on technical and composition aspects contained in identified areas of need.
  3. Business educators should relate perceived difficulties to assessed deficiencies in planning techniques for letter writing instruction.
  4. The problems of workplace writing should be more intently addressed.
  5. Banks should provide additional training in business writing to all bankers who write external letters.
- This section contains a discussion of matters that support these recommendations.

Recommendation 1: Business educators should take perceptual differences between themselves and writers of

business correspondence in the workplace into account in developing strategies for letter writing instruction.

This study was designed to suggest ways for business practitioners and business educators to improve instruction in the writing of business letters. It combines attitude and quality assessments of key letter writing aspects, both composition and technical. The findings indicate that letter writers' perceptions of difficulties in writing are often different from those that exist. Adkins' (1982) study noted significant differences in the perceived employability need for certain aspects pertaining to letter writing among business professionals, teachers, and students.

Business educators should obtain similar information to that gathered within the present study from a variety of professionals. They can use such information to improve business writing instruction. Similar survey and assessment instruments can be applied to the various professionals. The present study advances Storms' (1983) recommendation to survey small groups of professionals and assess their writing samples as a tool for the betterment of business communication design and delivery.

In business correspondence courses, the instruction is likely imparted to a heterogeneous group in terms of

career choices. Studies of writing problems within the various professions can help instructors to individualize and diversify assignments so that all students --including those undecided upon future work--can benefit. At the same time, such studies can be assembled and compared to fulfill a recommendation by Leonard and Gilsdorf (1990). They called for an instructional emphasis on writing usage aspects receiving legitimate error status by a consensus of users. While faculty members tend to perceive communication skill areas in broad terms to cover a variety of work settings (Lemley, 1983), they should not lose touch with their constituent groups in the field.

Recommendation 2: Instructional techniques for letter writing should have an emphasis on technical and composition aspects contained in identified areas of need.

Pearce and Barker (1991) expressed the need to further instructional expertise with the development and use of objective instruments for assessing writing quality. The present study offers one such means of identification--analyzing a particular business group in terms of both perceived and assessed letter writing problems. The findings can serve as the basis for

instructional practice.

Feinberg and Pritzker's (1985) study confirms that writing aspects necessary for business communication in secondary and postsecondary courses are not superfluous in still more advanced instruction. Their course model for business communication at the MBA level contains a number of composition and technical aspects included in the present study. Their aspects relating to wordiness, organization, and grammar were often cited as deficient in the present study. This suggests that such writing aspects demand continual attention and refinement by professionals who advance academically or professionally.

Recommendation 3: Business educators should relate perceived difficulties to assessed deficiencies in planning techniques for letter writing instruction.

The findings of the study suggest that business professionals' perceptions of difficulty for some letter writing aspects can differ considerably from assessed deficiencies within their actual letters. The participating bankers incurred numerous writing deficiencies for certain writing aspects they perceived as low on the difficulty scale. Conversely, on certain other writing aspects perceived by the bankers as more difficult, few if any deficiencies were assessed. Consequently, busi-

ness writers' perceived struggle with aspects of letter writing can be somewhat at odds with their manifested work.

Quible (1991) suggested that general writing competencies are somewhat more important in developing business documents than are specific business communication competencies. The present study found that deficiencies exist in the more general composition and technical aspects of letter writing. Aspects such as clarity, sentence construction, abbreviations, and article usage received deficiency assessments that exceeded their perceived difficulty by a wide margin.

More and better guidance is needed in business letter writing. The bankers participating in this study lacked instruction, training, and reference materials devoted to business letter writing that they apparently needed. The shortage of college writing instruction beyond freshman composition concurred with Tebeaux's (1988) findings, that a similar condition among most college-educated business writers exists.

Recommendation 4: The problems of workplace writing should be more intently addressed.

Quantity and quality factors of the bankers' business letter writing backgrounds support this need.

Prospective and current business professionals who may communicate with external constituent groups should be screened for prior in-school instruction in letter writing. Businesses should not assume that their employees have acquired all the necessary writing skills in their academic programs.

The study's letter assessments indicate a depth and variety of deficiencies that could diminish the effectiveness of the letters the bankers wrote. The bankers' ratings on overall quality of training received denotes dissatisfaction in their preparedness to write effective letters. The notion of continuing support in writing instruction was supported by Hiemstra, Schmidt, and Madison (1990), who cited intensified communication needs for a group of Certified Management Accountants (CMA). They found a lack of scholastic coursework in written business communication by over half of the CMAs surveyed.

Recommendation 5: Banks should provide additional training in business writing to all bankers who write external letters.

The present study found 900 composition and technical deficiencies within 60 letters submitted by 15 bankers. The average of 15 deficiencies per letter is particularly disturbing when one considers that repeat

occurrences of an aspect deficiency within a letter were not added to the total.

While encouraging improvements at the scholastic level, banks should provide opportunities for development in letter writing skills. This may be accomplished by conducting in-house training. Those writing aspects indicative of perceived and assessed problems by the participants should be considered for emphasis in training sessions. Many banks employ writing specialists in their administrative headquarters. Ways of sharing these specialists' skills with bankers in the branch offices should be sought. Other delivery methods include enrolling employees in continuing education classes with writing emphases, and sending employees to refresher seminars tailored to writing tasks. In addition, all bankers should have ready access to a correspondence writing manual that contains clear and relevant reference information. The lack of this low-cost option at many bank branch locations suggests possible neglect or uncertainty in promoting workplace writing skills.

In their study, Goodin and Swerdlow (1987) cited letter deficiencies of style that were fourth highest in the banking services sector among 13 organizational

categories. The aspects of this assessment area included many that were adapted to the present study: tone; positive versus negative terminology; jargon; slang; transitional words and phrases; legalese; conciseness; condescending statements; active voice (versus overuse of passive voice) in sentences; and gender bias in language. The present study found two aspects of this area--conciseness and active voice (versus overuse of passive voice) in sentences--to rank highest in deficiency magnitude among all composition and technical aspects, respectively.

#### Suggestions for Further Research

A study in which members of a profession are assembled and given letter writing tasks under prescribed conditions would facilitate assessment standardization, particularly for composition aspects of writing. Further research may determine the extent to which perceived difficulties in writing cause originators to circumvent or avoid more troublesome writing aspects. Such findings may aid business educators in developing a more comprehensive and effective approach to developing writing skills.

Other questions about the business letter writing process that research can answer include: To what

extent does perception or knowledge of a difficult writing aspect help the originator prevent deficiencies in that aspect? Does heightened awareness of perceived writing problems diminish attention to other problems perceived as less difficult? How can attention to all important writing aspects--regardless of perceived difficulty--best be achieved?

Further, a study that compares the business writing skills of professionals who receive on-the-job training with those relying on prior scholastic instruction may indicate composition and technical aspects most amenable to remediation. Providing reference manuals could also be a substitution for on-the-job training in a similarly designed study.

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APPENDIX A

PARTICIPATION REQUEST TO BANKERS

The critical importance of communication skills is recognized by managers and professionals at all levels of business. In banking, a field in which the service component is vital, relations with clients and customers are an ongoing concern.

If you are a banker whose external communications include the writing of business letters, please consider sharing some information concerning your involvement. I am conducting a research project that addresses problems and difficulties in business letter writing. The study is part of my doctoral dissertation in the area of business education, under the direction of an advisory committee at Virginia Polytechnic Institute and State University.

As a participant in this project, you need only meet the following requirements:

(1) You regularly originate external business letters consisting of direct and indirect formats. Direct formats are those generally used for either favorable or neutral messages. They begin with the main point, followed by supporting details. Indirect formats are often used in relating unfavorable (to the recipient) information or replies. They begin with supporting details in preparing the recipient for the main point that follows.

(2) You will submit copies of four letters as described in item #1 above, using your judgment to select two letters each in direct and indirect formats. The letters should be among the most recent you have written. Total letter length may vary from three paragraphs (of any length) to two full pages.

(3) You will respond to survey instruments following submission of your four letters. The instruments deal with the subject of business letter writing. You may complete these either at work or at home. No extended written responses are required. You will probably need less than forty-five minutes to complete the surveys; however, you may accomplish this over a two-day period.

I will soon contact you again to discuss your possible involvement in this research. In the meantime, please call me at \_\_\_\_\_ if you have further questions about the study.

APPENDIX B

REQUEST FOR INSTRUCTORS TO SCREEN  
COMPOSITION DEFICIENCIES

Dear fellow educator:

As a business communications instructor, you have doubtless searched for proven principles and techniques that succeed in workplace conditions. You have included written business correspondence within the area of transferable skills you seek to impart. As a result, you have gained knowledge that is valued in research.

I am conducting a study as part of a doctoral dissertation in the area of business education, under the direction of an advisory committee at Virginia Polytechnic Institute and State University. This investigation of business letter writing problems includes screening of bankers' external letters for composition deficiencies.

Please consider lending your expertise by screening ten business letters randomly assigned from a sample set. A simple checklist, containing 40 composition factors that may be assessed by independent review, will accompany each letter. You would simply indicate any of these factors you consider deficient in the letter being screened. This checklist technique will permit you to complete the assessments in a time-efficient yet thorough manner.

I will contact you again soon to discuss your possible involvement in this research. In the meantime, please call me at \_\_\_\_\_ if you have further questions about the study.

Sincerely,

Ellis A. Hayes

APPENDIX C

INSTRUCTIONS FOR Q-SORT INSTRUMENT

In this kit you will find the following:

- Box containing set of 40 blue colored cards with affixed labels
- Box containing set of 40 pink colored cards with affixed labels
- Nine container bins with attached numbers

1. Stack the container bins vertically on a table or countertop where you can access each level. (Back the bins against a wall for stability.) It is important that you stack and maintain the bins in an order of numbers attached to the front of each bin. From top to bottom, the bins should appear as follows:

MOST DIFFICULT	2	(top)
	3	
	5	
	6	
	8	
	6	
	5	
	3	
LEAST DIFFICULT	2	(bottom)

These numbers represent the quantity of cards to be placed in the various bins.

2. Select the set of blue cards. These cards represent factors pertaining to business letter writing. Consider the difficulty of each factor in relation to others in the set. How much of a problem does a particular factor present to you in writing business letters? The container bins represent a continuum of factor difficulty. The closer to the top bin a card item is placed, the more difficult you perceive it to be. Conversely, the closer to the bottom bin a card item is placed, the less difficult you perceive it to be. Card items placed in the center bin represent the midrange of difficulty perception.

3. IN YOUR FINAL ARRANGEMENT OF THE BLUE CARDS, EACH BIN MUST CONTAIN A QUANTITY OF CARDS EQUAL TO THE BIN NUMBER. Sorting within a single bin is unnecessary. However, you may need to sort and re-sort several times among the various bins before reaching a satisfactory arrangement.

4. When you have completed your sorting of the blue cards, carefully remove the card pile from the bottom (LEAST DIFFICULT) container bin. Continue removing and placing each successive card pile on top of the previous one. As you remove each pile, make sure that its card quantity matches the bin number.

5. Return the combined pile of sorted blue cards to its original container box. The top (MOST DIFFICULT) card pile should face the container box side labeled "TOP".

6. Select the set of pink cards, and repeat Instructions 2 through 5 above. Substitute the word "pink" for "blue" throughout these steps. (At no time should the blue and pink cards be combined.)

7. Upon completion, disassemble the container bins. Return the entire kit and instructions to the kit bag.

APPENDIX D  
BANKER SURVEY

Place an "X" in the appropriate choice blanks; write additional answers in the space provided.

(1) Did you receive any scholastic instruction in business letter writing?

\_\_\_\_\_ NO

\_\_\_\_\_ YES

If yes, rate the overall quality of this instruction.

\_\_\_\_\_ excellent

\_\_\_\_\_ good

\_\_\_\_\_ fair

\_\_\_\_\_ poor

If possible, indicate the name and college/grade level of any such course(s).

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(2) As a banker, have you received any formal job training in business letter writing?

\_\_\_\_\_ NO

\_\_\_\_\_ YES, approximate hours attended: \_\_\_\_\_.

If yes, rate the overall quality of this training.

\_\_\_\_\_ excellent

\_\_\_\_\_ good

\_\_\_\_\_ fair

\_\_\_\_\_ poor

(3) Does your employer provide you with reference material concerning business letter writing?

\_\_\_\_\_ NO

\_\_\_\_\_ YES

If yes, rate the overall quality of this material.

\_\_\_\_\_ excellent

\_\_\_\_\_ good

\_\_\_\_\_ fair

\_\_\_\_\_ poor

APPENDIX E  
INSTRUCTIONS AND SCREENING INSTRUMENT  
FOR COMPOSITION DEFICIENCIES

04 September 1992

From: Ellis A. Hayes  
To: Screening respondent  
Re: Instructions

Please read and critically examine the first enclosed letter (A). Using the checklist of composition factors, judge whether each factor is in some way deficient in this letter. A deficiency may apply either to the entire letter or any part of it. The extent or severity of a factor deficiency need not be indicated. By check marking a factor, you are indicating that it falls at least somewhat short of the standard you would recommend. By leaving a factor blank, you are indicating that it meets your recommended standard (or is not applicable to this letter). Follow the same procedure for each of the remaining letters (B through J), using the appropriate column code for each.

You will notice that some proper names and other items are deleted from the letters. Please treat all letter contents confidentially. Extra copies of the checklist forms are provided should you need them.

I will arrange to collect your completed response. May we accomplish this by Monday, September 21? Thank you for lending your expertise on behalf of this research.

PLACE A CHECK MARK WHERE A DEFICIENCY EXISTS

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Letter Code: \_\_\_\_\_

- \_\_\_\_\_ ---clarity
- \_\_\_\_\_ ---coherence
- \_\_\_\_\_ ---completeness
- \_\_\_\_\_ ---concluding the message
- \_\_\_\_\_ ---concreteness
- \_\_\_\_\_ ---condescending statements
- \_\_\_\_\_ ---concise wording
- \_\_\_\_\_ ---conflict resolution
- \_\_\_\_\_ ---correctness
- \_\_\_\_\_ ---demeaning expressions
- \_\_\_\_\_ ---diplomacy/tact
- \_\_\_\_\_ ---direct vs. indirect approach
- \_\_\_\_\_ ---emphasizing significant points
- \_\_\_\_\_ ---ethical standards
- \_\_\_\_\_ ---euphemisms
- \_\_\_\_\_ ---gender bias in language
- \_\_\_\_\_ ---good news conveyance
- \_\_\_\_\_ ---idea sequencing
- \_\_\_\_\_ ---information placement
- \_\_\_\_\_ ---jargon
- \_\_\_\_\_ ---justifying position
- \_\_\_\_\_ ---legalese
- \_\_\_\_\_ ---letter organizing, structuring
- \_\_\_\_\_ ---logical focus and flow
- \_\_\_\_\_ ---originality
- \_\_\_\_\_ ---paragraph structure
- \_\_\_\_\_ ---persuasion techniques
- \_\_\_\_\_ ---positive versus negative terminology
- \_\_\_\_\_ ---refusal conveyance
- \_\_\_\_\_ ---relevant details
- \_\_\_\_\_ ---responsibility acceptance
- \_\_\_\_\_ ---sentence construction
- \_\_\_\_\_ ---slang
- \_\_\_\_\_ ---stating purpose
- \_\_\_\_\_ ---tone
- \_\_\_\_\_ ---transitional words, phrases
- \_\_\_\_\_ ---trite expressions
- \_\_\_\_\_ ---unfavorable news conveyance
- \_\_\_\_\_ ---word usage in context
- \_\_\_\_\_ ---"you" concept development

APPENDIX F

SCREENING PANEL RESPONSE MEMORANDUM

08 September 1992

From: Ellis A. Hayes

To: Screening respondent

Re: Provision for your September 21 response

A few days ago, I forwarded instructions that permit you to identify the composition deficiencies in selected business letters. Please contact me at \_\_\_\_\_ if you did not receive the information, or if you want a clarification.

You need only return your completed screening sheets--one sheet representing letters A through E, and another for letters F-J--in the enclosed self-addressed, stamped envelope. To ensure identification, please print your name on both sheets.

I encourage you to dispose of the screened letters with deference to bankers who submitted the material for research purposes. Thanks again for your generous effort.

VITA

Ellis Arnold Hayes, born October 21, 1952, is a native of Wilkes County, North Carolina. He received an Associate of Arts degree from Wilkes Community College, a Bachelor of Science in Business Administration from Appalachian State University, and a Master of Science from the University of North Carolina at Greensboro. He has been on the faculty of Wingate College since 1987, and currently serves as an assistant professor and interim dean in the School of Business and Economics.

Dr. Hayes has worked in the education field since 1980, when he began a six-year tenure as a business training specialist for the Abu Dhabi National Oil Company in the United Arab Emirates. He has also taught at UNC-Greensboro and Burlington Williams High School. His academic honors include membership in Beta Gamma Sigma, Phi Kappa Phi, Phi Delta Kappa, and Delta Pi Epsilon.

A United States Navy veteran, he is a charter member of the Matthews Kiwanis Club, where he chairs the sponsored youth program. He resides in Indian Trail, N.C., with his wife, Sheila Lynne. They are members of Calvary Church in Charlotte.

  
\_\_\_\_\_  
Ellis A. Hayes