

# DOCUMENT SERIES

## PROJECT INSTRUCTIONS

Percentage Weight of Final Grade: 10-20%

### LEARNING OBJECTIVES

- Write for a specific purpose and audience
- Create various forms of business correspondence and documents
- Develop effective business correspondence writing style, paying particular attention to concision (i.e., avoiding wordiness), paragraph construction, and tone

### ASSIGNMENT

Choose one of the following scenarios, and produce the requested documents for one scenario only. Each scenario asks you to prepare a range of documents. Students are responsible for determining the appropriate genre (email, memo, business letter, etc.) as well as the content of those documents.

#### SCENARIO 1

You are the project manager for Memory Acres-- a nationally established funeral home company that offers many funeral services such as burial plots in the cemeteries they own. Your responsibilities include managing the relationships between potential cemetery sites and local populations as well as overseeing the day-to-day operations of projects. You also report to the Memory Acres Board. Rather than a traditional CEO corporate structure, Memory Acres makes decisions via a multi-person board made up of various stakeholders that includes donors and executives with different interests and values. The executives have an interest in making smart investments and the donors are interested in how decisions impact people. You must keep them apprised of the progress of the project and any situations that arise taking into account their different areas of expertise. Currently, Memory Acres Board is interested in expanding their presence in Tampa, FL, Memory Acres and wants to purchase an additional location on vacant land in Hillsborough County.

Mike Jones, the landscape architect, fulfills an essential role in planning and executing the project and is in charge of designing plans for tree removal and land resurfacing. The proposed land runs parallel to The Great Reservation which is one of six Tocobaga Indian reservations governed by the federally recognized Seminole Tribe of Florida. In addition to expanding Memory Acres properties, the project would create a needed access road that would help rural community members get to their children's schools quicker and more directly, a benefit to the local population that was very important to the donors on the board.

The preliminary plan your team has put together proposes removing many trees and resurfacing large plots of land that border The Great Reservation; however, there has been some pushback from the Seminole Tribe of Florida as some in the community feel the trees are culturally significant. They have elected the Chairman of the Tribal Council Dekota Osceola to represent their interests and strongly oppose the destruction of trees and resurfacing of the area. Chairman

Commented [LM1]: If students need to write a document to the board, there needs to be a sentence following the first sentence to describe the role of the board. Said another way, why the board and not one person? I like the idea of the board, but we need to add a bit of context about the board here.

Osceola has gotten in touch with the company and wants to discuss the destruction of the trees, as well as the road benefit.

Before you can move the project forward, you must meet with Chairman Osceola. To do this you need to lay the groundwork for a productive conversation. You will need communicate with the executive board to align your position with their goals, and you will need to send word to Chairman Osceola that you have heard his concerns and want to set up a meeting. Finally, you need to communicate with the landscape architect, Mike Jones, regarding the status of the project.

## DELIVERABLES

- Document to the Memory Acres' executive board
- Document to Dekota Osceola, Chairman of the Tribal Council
- Document to Mike Jones, the landscape architect

## SCENARIO 2

You are a customer relations manager at Matt's One Hour Air Conditioning & Heating company. This locally owned, family company has been in business for 25 years, but it has recently been acquired by its new CEO, Ervin Holder. The new owner prides himself on continuing the family style approach to business, where the goal is to "make customers feel like family." Because of this, he has promised to honor all the warranty claims from customers who purchased units under the previous owners.

However, you have received an angry email from a customer, Melissa Smith. She claims that after her air conditioning unit broke, the company technician asked her to pay \$900 for a capacitor which is still under warranty. You know that the new owner is honoring all previous warranties, so you decide to investigate the issue further.

You realize that Melissa Smith's warranty is no longer listed as active in the company database. In fact, you notice many warranty accounts for existing customers are no longer active. Looking through the database settings, you realize the database has not been updated since the transition of ownership. There are different types of warranties based on the unit purchased. Each month, the system checks for warranties that are active and renews them while it inactivates warranties that are expired. If the update is not run monthly, certain types of warranties will not be reactivated and will display as inactive.

Because you are a small company, you work with IT Logic, a local IT contractor, for your IT services. You call the customer service number and speak to Fatima Salinas, who is able to initiate the system update. Now you need to get in touch with Inaya Rose, the account manager for IT Logic to make sure updates are done regularly.

To resolve the issue and make sure it doesn't happen again, you have some writing to do. You will need to update Ervin Holder, the new owner. You also need to explain the situation and what needs to be done to Inaya Rose. And you further need to get in touch with Melissa Smith to let her know the status of her account.

## DELIVERABLES

- Document to Ervin Holder, the company owner.
- Document to Melissa Smith, the customer.
- Document to Inaya Rose, the company's IT contractor.

## SCENARIO 3

You are a district manager at OmniShop, a large retail chain that sells everything from candy to expensive electronics (similar to Target or Walmart). You personally oversee 10 stores in the South Florida area, and are responsible for reporting on the overall operation of these stores to your regional manager, Jada Mejia, who oversees about 100 stores in the southeastern US. You are one of 10 district managers who visit the brick-and-mortar stores, diagnose and troubleshoot issues of waste and safety, and report your findings to her. On any given day, then, you have about 10% of her attention, unless there is an important issue.

Recently, your company has begun hiring dedicated salespeople for the Body Care Improvement (BCI) aisle in all stores nationwide. BCI products (such as vitamins and protein powders) represent extremely high profit margins, but recent customer surveys show many shoppers will often leave the aisle overwhelmed and confused by the variety of options. Similar to the specialists you hire in electronics or the pharmacy, BCI Specialists are expected to know about their products and be available to customers in the aisle to answer questions. Sulaiman O'Neill, who oversees the entire BCI business unit at your company, has told you that pilot programs have demonstrated that a dedicated specialist can increase BCI sales, which benefits OmniShop's bottom line.

You decide that you need to see the issue first hand, so you schedule meetings on your regular visit with the BCI specialist and the store manager. The BCI specialists explain to you that they were told to stay in their aisles to assist customers, but they do not feel comfortable telling the manager no when asked to help in other ways. The managers explain they did not understand that the BCI specialists have very limited duties and are only there to answer questions about their area. Because of this disconnect between manager and employee expectations, BCI specialists are often not in their aisle when customers have questions, and are instead stocking shelves or working cash registers. The solution is clear. Managers need to be trained to properly utilize the BCI Specialists, as it is highly likely that other stores are having the same problem. To implement this plan, you will need to get writing.

## DELIVERABLES

- Document to Jada Mejia, your Regional Manager, who likes to be kept informed
- Document to the managers at your 10 locations
- Document to Sulaiman O'Neill, director of the BCI business unit, outlining the planned training process for store managers