**Business Administrator**

**Business Communication and Interpersonal Skills**

**IT, Record and Document Production**



# Introduction

Improving communication makes all organisations better, with more sharing of ideas and higher morale. Organisations that think of their employees as customers and treat them well create a form of advertising, because employees tell others what happens at work, and it’s better to have them saying positive rather than negative things. Organisations need to communicate both with their employees and their customers. An internal newsletter or intranet helps employees know what’s going on.

Information systems developed must provide information that is relevant, timely and accurate. Information is only relevant if it can be used to help make a decision. It is only timely if it is readily available when decisions have to be made. And it must be accurate enough to help ensure that the correct decisions are made.

In this theme you will cover the following learning outcomes:

1. understand negotiation in a business environment
2. understand how to develop and deliver presentations
3. understand how to create bespoke business documents using different IT packages
4. create a portfolio of evidence to support your EPA
5. understand information systems in a business environment

## Explanation of words used in this booklet and a business environment:

***Optimum:*** The best or most suitable within a range of possibilities

***Contingency Plan:*** A plan about how to react to an event that might occur in the future, especially a problem that might arise unexpectedly

***Penultimate:*** Second to last in a series or sequence,

***Alienating***: Causing somebody to change his or her previously friendly or supportive attitude and become unfriendly, unsympathetic or hostile

***Succinctly:*** Expressed with brevity and clarity, with no wasted words

***Demographics:*** Groups of people characterised by age, income, sex, education, occupation, socio-economic group etc.

***House Style:*** A set of rules concerning spellings, typography etc to be applied within a company

## Commercially

***Sensitive:*** Information that an organisation would not like to be in the public domain as it may give an advantage to a competitor

***Trade dress:*** A product’s physical appearance, including its size, shape, colour, design and texture. In addition to a product’s physical appearance, trade dress may also refer to the manner in which a product is packaged, wrapped, labelled, presented, promoted or advertised, including the use of distinctive graphics, configurations and marketing strategies***.***

***Data Controller:*** The person who decides the purpose for which personal data is to be processed

***Read Only Tag:*** A computer setting that means users are unable to change the content of a file

***Hunch:*** intuitive feeling about something

***Methodologies:*** The methods and principles used for doing a particular kind of work ***Hybrid:*** Something made up of a mixture of different aspects or components ***Inter-related:*** In a relationship in which each depends on or is affected by the other

or others

## Negotiating in a Business Environment

Negotiation is a skill that must be learned. It is used not only when attempting to get the best deal from suppliers or customers, but also on a daily basis when dealing with management, colleagues, trade unions and/or legal advisers. When faced with one or more suppliers who are intent on obtaining your business, or potential customers who are trying to negotiate the best deal for their organisation, you can be sure that they will be skilful and experienced negotiators. If you are to conclude a deal that is beneficial to your organisation, you need to prepare well for the discussions you are going to have. These discussions may be face to face or over the telephone, but you will need preparation in either case.

Before you talk to potential suppliers or customers, you need to be clear in your own mind about what it is you want to achieve. Ideally, of course, from suppliers you want a deal at a great price for a guaranteed quality of product or service, exclusive to your organisation and with penalty clauses for any failure to meet your terms. Your potential customers will be looking for exactly the same from you. In reality you are extremely unlikely to achieve your ***optimum*** outcome, so you must decide before you start:

* what you are going to ask for
* what you are prepared to concede – and what you have the authority to concede
* the point at which you cannot accept any further compromise.

Your starting position will be that you want to receive or deliver certain conditions in terms of quality, quantity, timing, service and price. Some of these will be more important to you than others, so the less important will be those you are prepared to concede. Each will have a minimum level that you are prepared to accept – if the supplier or customer’s best offer is below this minimum, you may have to walk away and look elsewhere.

The supplier or customer will recognise that your starting position is just that. The skill lies in not letting them know what your minimum level is, or they will offer this and know you have to accept it. In most cases, you will state your starting position, the other party will state theirs, and you will need to negotiate to narrow the gap between the two. Your goal is to reach agreement as close as possible to your starting position; their goal is to finish as close as possible to theirs.

Negotiation skills are also used every day to achieve outcomes not related to sales but to relationships. For example, building rapport and using active listening skills can help you to achieve a good relationship with a customer and have positive end results. You will also use skills like this to change difficult customers or complaints to a positive outcome. These are also negotiation skills!

## Approaches to Negotiation

There are a number of tactics used by experienced negotiators to gain an advantage. Negotiations may be concerned with contracting, buying and selling, and staffing or financing. If you learn these tactics you can use them yourself, and you can recognise when they are being used against you and use tactics to counter them.

Approaches to negotiation may include:

* REPLACE WITH TYPES OF NEGOTIATION

AND REFLECTIVE ACTIVITY RELATING NEGOTIATION STYLES TO REAL LIFE EXAMPLES

## Developing and Delivering Presentations

There are many different ways of giving presentations:

* in person
* via audio link
* via video link
* via webinars
* via round-the-table discussion.

The principles for giving an effective presentation remain the same, whatever method of delivery is used. Presenters who know and understand their subject will work from notes that simply state the keywords that they must not forget to mention, and will improvise around these prompts. This usually gives a more free-flowing impression to the audience and encourages interaction. It doesn’t work if the presenter is not prepared for questions that need greater depth of knowledge.

If you are preparing keyword notes for yourself or the presenter, make sure they are in a large enough font to be seen at a glance so that the presenter does not have to lift the notes up to refer to them. The notes must appear in the same order as the topics to be covered or the presenter will be in complete confusion trying to gather their thoughts.

The most common sequence used by presenters is:

* tell them what you are going to tell them
* tell them
* tell them what you have told them.

In other words, describe the content of the presentation, give the presentation, then confirm the main points. When preparing the presentation, however, it is better to write the close first, then the opening and finally the main body. This will allow you to clarify in your mind that you understand the purpose of the presentation before trying to produce the individual handouts or slides that will explain the detail.

## Resources

Resources required when developing a presentation include information, equipment and people. Providing handouts for the audience allows them to take notes to capture the key points of the presentation and will help them to remember these later. There are different kinds of presentation including formal, informal, promotional, and training presentations and demonstrations.

Reasons for producing handouts include:

* to explain technical terms or concepts for members of the audience who may be unfamiliar with them
* to provide background information that the presenter doesn’t have time to give
* to provide statistics that support or explain the presenter’s comments
* for use in workshop sessions or brainstorming exercises
* to give a hard copy of a diagram or graph that the audience needs to study in detail
* to give the audience a list of topics to be covered
* to provide the audience with a hard copy of the slides being presented so they can make notes against them.

Handouts must concentrate on the message of the presentation and avoid being an excuse to overload the audience with information.

If you have agreed with the presenter that handouts would be helpful, the handouts must be produced in a way that maximises their effect. Handouts must help the audience remember both the presenter and the message and, more importantly, to understand the message.

Within a few days of attending a presentation, studies show that most people will remember only 10% of what they heard, but well-written handouts significantly increase this.

Well-written handouts will be printed on good-quality paper to give an immediately favourable impression. They should contain graphics whenever possible, as people give more attention to a chart or a diagram. Leave white space around the margins and between paragraphs and pictures, and in general fill no more than two-thirds of the page.

The presenter will probably decide when to give the audience the handouts – before, during or after the presentation. If they are given out during the presentation, they can distract the audience from listening to the presenter. From the point of view of preparing the presentation, you will need to know in advance when the presenter intends to distribute the handouts so that you can make sure they are available.

Some presenters prefer to use a flipchart or whiteboard as the visual aids to support their presentation, but most will want to use a slideshow. These can be presented using presentation software on a computer. A relatively simple laptop computer can project an infinite variety of words and images, including photographs and even videos.

It’s often said that ‘anything than can go wrong, will go wrong’. This is always particularly true where equipment is concerned, so when preparing a presentation it is always best to have a ***contingency plan.*** If the presentation is to be given on a remote site, email it to the event organisers in advance, and ask them to load it onto the equipment that will be used and run through it to check that everything works as expected. The presenter can then take a copy of the presentation on their own laptop, or on a disk or pen-drive, as a back-up.

## Producing the Slides

An important part of preparing for a presentation is to produce slides that are suitable for the content of the presentation and the audience.

The slides must look professional. They should use a consistent format and typeface, as well as colours that will be legible from the back of the room. Avoid the use of too many colours

as this can be confusing. Remember that the printed handouts of the slides may well be produced in black and white, so information presented in different colours on the screen may appear the same in the hard copy.

When using a presentation program to prepare the slides, use a master slide to store information about the theme and slide layouts of the presentation, including the background, colours, fonts, effects, placeholder sizes, and positioning. You can then make changes to every slide in your presentation without having to update each slide individually. This is especially useful when you have extremely long presentations with lots of slides.

Each slide should be numbered and show the logo of the presenter’s organisation.

The first slide in the presentation should give the title of the presentation, the event, the date and the name of the presenter. Members of the audience will be able to refer to their handouts of the slides to remind themselves of these details weeks after the event, when otherwise they are likely to have forgotten. The title of the presentation should be memorable in order to catch the attention of the audience, but without being so quirky as to risk detracting from the presentation’s professionalism.

A question may work well as a title, such as: ‘Where next for banking?’

The second slide should set the tone. It might contain the main point of the presentation or a witty quote. If you can make the second slide either controversial or amusing, do.

The third slide should list the objectives of the presentation so that the audience is fully aware of what they can expect.

The fourth slide should list the topics that the presentation will cover. Ideally, there should be three themes. Any fewer and the presentation is likely to be very short; any more and the presenter will likely be rushed to cover all of the information.

Each theme should be covered in a few slides, three to five slides per theme. If a theme can be covered in fewer than three slides, it may not be substantial enough to stand alone; if it needs more than five slides, it may need splitting into two themes.

Each slide should have a heading and around thirty words of text. If you are using an illustration, you should use fewer words on that slide or the audience will find them difficult to read.

Bullet points are a really good way of getting a lot of information onto a slide in relatively few words, but each bullet point must make sense in its own right. For instance, a bullet point relating to the point in the previous paragraph of this book might say:

* Fewer words on slides containing illustrations. Rather than:
* Fewer words. Or
* If you are using an illustration, you should use fewer words on that slide or the audience will find them difficult to read.

The penultimate slide should recap the objectives of the presentation so that the presenter can check that the audience feels they have been met and give them a final opportunity to ask questions or raise issues.

The final slide should give contact details for both the presenter and any other part of their organisation that the audience might wish to contact.

While adding images, movement and video into slide presentations will make them look more impressive, you need to be careful that they do not detract from the message. If the

audience is too busy thinking how clever or how attractive the slides are, they will not be able to concentrate fully on the content.

It is a good idea to avoid graphs, charts or tables that cannot be quickly understood. If the audience is going to take more than five seconds to grasp the information, give it to them as a handout and use the slide to make the point that the diagram illustrates. Again, don’t put all the words the presenter is going to use on the slide – if you do, there is no point in having a presenter as the audience could simply read the slides for themselves.

You will also need to proofread each slide to ensure the presenter doesn’t look bad on the day of the presentation because you have either incorrectly spelt a word or used bad grammar. Remember that they will be the one standing in front of an audience presenting your work, so they need to be happy with it. If it comes down to a choice between what they want and what you think they should have, their view should be accepted.

When you have prepared a presentation for someone else, you will usually receive feedback from the presenter. They will tell you if they were happy with the slides, handouts etc produced or if they want any changes made before repeats of the presentation.

You should ask the presenter to share with you the feedback that they get from the audience. Feedback on the presenter’s performance will not be helpful to you, but feedback on the materials that you produced will help you – and the presenter – improve the next presentation.

## Your Own Presentation

When you are due to make a presentation yourself, remember that the planning and preparation will take longer than the actual presentation, probably two or three times as long, so start planning in plenty of time. Clarify exactly what is required and the facilities that will be needed. Check how much time is available for the presentation and remember that some of that time will be needed for questions, so plan to develop a presentation that will fit comfortably into the time available.

There are different kinds of presentation including formal, informal and group presentations. Most will fall into one of two types:

* an informative presentation, such as a training session, a report on outcomes or a demonstration of a product or service
* a persuasive presentation, such as to promote sales or persuade an audience of the benefits of a plan.

Make sure you know which you are preparing for. The content will vary if the presentation is designed to change the audience’s mind or encourage them to make a favourable decision rather than to provide them with information.

You also need to be clear about your audience. The number of people attending will influence the style of the presentation, as will their level of knowledge of the subject. A useful test of the effectiveness of a presentation is the ‘last person test’. The last person in an audience is the one with the least knowledge or experience of the subject. If the last person will be able to understand the message that the presentation is trying to deliver, the presentation will have achieved its purpose. If you don’t believe this will be the case, you need to re-write the presentation until the last person will understand.

You also need to consider how much audience participation you will encourage or allow. This will affect the timings of the presentation, so remember to allow time for the audience to ask questions, make comments or join in with discussions if this is going to be part of the presentation.

When you start to put the presentation together, you need to be clear what the main point is that you want the audience to understand. It should be possible to present the main point in one sentence which can be explained verbally in no more than twenty or thirty seconds. The main point should be referred to in the opening part of your presentation and confirmed in the closing part. All of the content of the presentation must be consistent with the main point.

You also need to be clear what the objectives of the presentation are. As these will be revealed to the audience at the beginning of the presentation and checked at the end – to ensure the audience agrees with you that they have been met – they must be specific and measurable.

There are two schools of thought on how much of the presentation should be written down before the event. Some presenters work from a script, where every word is decided beforehand. This works if you are experienced enough to be able to memorise the script and confident enough to be able to digress if a question is asked and return to the script after dealing with the interruption. Where it doesn’t work is if you simply read the script to the audience. In this case you may as well print off the script and hand it out for the audience to read for themselves.

## Practising Your Own Presentation

When you have finished putting together the presentation, it is absolutely vital that you practise delivering it. If you are inexperienced at making presentations, practice will help you to overcome your natural nervousness. There is nothing worse than waiting to make your first presentation feeling unprepared, knowing you are, either going to forget what you wanted to say or finish saying it with half the available time still left and nothing to fill it with.

Even if you regularly give presentations, you should practise each new one as you will want to fine-tune the timings.

There are lots of different ways to practise. With experience you will find the method that best suits you. Until then, try all of them. Practise the beginning, the ending, using the equipment, writing on the flipchart and the links from one topic to the next. When you have these perfected, the main presentation will seem easy.

Practise short sections of the presentation separately. This is how actors rehearse. They don’t try to learn the whole play at once: they learn a scene at a time until they know the whole of their part.

Practise in a realistic situation. When you deliver the presentation, there will be distractions. People will move about, ask questions, get up and pop out of the room, so practising in an ideal setting will not prepare you for the real thing.

Practise thinking ahead. If you have memorised your presentation, or at least the keywords that you are using as prompts, you should be able to think a sentence or two ahead of what you are actually saying. This makes the presentation smoother, as each sentence triggers the next.

Practise your body language. You need to be aware of what you are doing with your hands because your audience will be. If your nerves make your hands shake, avoid holding papers in them as this will only emphasise the movement. If you plan to use hand gestures to emphasise points, use them when you are practising. This will help you remember as your brain will link the gesture with the point.

Think about whether you are going to move around. If you are presenting from behind a lectern or a desk, you will be standing still. If you are going to walk while you talk, practise this too – you don’t want to be caught out by finishing a point on the far side of the room away from the notes for the next point or the button to press for the next slide.

Practise in front of a mirror, or video your practice presentation. You will see what the audience will see. Ignore the fact that it’s you and try to focus on how you look as a presenter. If they (you) look confident, knowledgeable, competent, friendly, approachable, smart and presentable, then that is how you will look to the audience, too.

## Delivering Your Own Presentation

When the day of the presentation arrives, check that all the necessary resources – whether physical, electronic or web-based – are available and that the equipment is working. Don’t worry if you are nervous. Nobody delivers a live performance without feeling anxious. Many famous performers know it is the nerves that make their performance special. If you reach the point where you are completely relaxed before presenting, it is probably time to give it up. If you have practised well enough, you will have at least the opening completely ‘off pat’.

Smile, look confident and deliver your opening. Remember that the audience is on your side

* they have come to hear what you have to say.

Introduce yourself and tell the audience what you are going to tell them. Remember to emphasise why you are telling them and how long you will take to tell them. Tell them about the breaks you have organised and whether you will welcome questions during your presentation or whether you would rather they kept their questions to the end.

You will now have overcome your initial fear: no one has laughed at you or thrown anything. You will probably be starting to think that this is not such a terrible ordeal after all. You might even find that you are enjoying yourself – just be careful not to relax too much and forget everything you practised for the rest of the presentation!

Avoid starting with a joke. This is a business presentation and jokes are notoriously difficult to deliver, as you will know if you have ever watched a comedian ‘die’ on stage or TV. Jokes also have the unerring ability to offend someone: whatever the subject of the joke, you can almost guarantee that someone in the audience will be upset or offended by it, and you will have lost their support before you have really begun. NEVER start with an apology. It make you look ill-prepared

It is important to use language that suits the topic and the audience. The wording of a presentation delivered to new starters in an organisation would be completely different from that delivered to senior managers, for instance, even if the subject and content were the same.

Remember that audiences have very short attention spans and the younger the audience the shorter these will be. Each topic in your presentation will only hold the attention for a few minutes, so break them up with pictures or activities wherever possible.

Don’t expect an audience to sit and listen to you for long periods without giving them some form of diversion. As soon as you see any evidence that they are losing concentration, do something to bring them back. This may involve getting them to move into different groups, asking them to interact by relating their own experiences of the topic, writing their thoughts on sticky labels and attaching them to the walls – anything to get their interest back onto the subject.

Be careful to give them a reason for what you ask them to do, or you risk ***alienating*** them further.

During the presentation, use the tone, pace and volume of your voice to emphasise key points. Keep watching the audience so that you can gauge their reaction and adapt your presentation accordingly. Summarise your key points throughout the presentation so that you can check the audience has understood them.

Remember that you are the visual aid that the audience is most aware of, far more than the slides or the flipcharts. Use your body language to give an impression of being interested, even enthusiastic, about your topic and the audience will feel the same way.

Sometimes people in the audience will start to talk among themselves. The best way to deal with this is to simply stop talking and look directly at them. They will catch your eye and feel embarrassed at having behaved badly, increasing your authority in the eyes of the rest of the audience.

If you need to, give yourself time to think by asking the audience a question or setting them a task to carry out. If they ask you a question, be careful not to allow it to divert you from the message that you are there to deliver. If the question cannot be answered simply, say you will come back to it later. If you don’t know the answer, say so and offer to find out. In either case, remember to give the answer before the audience leaves, if possible, or follow up with the person who asked it so that you can let them have the answer later.

Your presentation will be more effective if you are able to introduce props. If you are introducing a new product, pass samples round so the audience can see and touch them – or, if they are catering samples, even taste them. Each additional sense you can involve will help the audience to understand and remember what you have told them and shown them.

Remember to leave the audience on a high. You won’t want to finish the presentation with a song, but remember why stage performers always try to end their act with something rousing or memorable. End by reinforcing the message that you had for them. Go back to the objectives you set for the presentation and let them see that they have been met.

## Evaluating Your Own Presentation

To help identify changes necessary to improve future presentations, it is important to collect feedback on your presentation. While you can reflect on your own performance and the reaction of the audience to identify learning points, you will have been too involved in the presentation to be truly objective about it.

There are a number of different ways to collect feedback on a presentation. One of the most effective ways of collecting qualitative feedback is to ask someone whose opinion you trust to sit in the audience and make notes. Try to avoid asking a family member or a friend to do this, as they will likely tell you what they think you want to hear. You want to know from them:

* + what was good about the presentation
  + what was not so good about it
  + how they would describe your technique areas that you could improve on.

Ask them specific questions rather than relying on generalisations and you will get valuable feedback that will help you make a more effective presentation next time.

A second method is to video your presentation so that you can view it later. The first time you watch yourself you will almost certainly be overly critical. Look for one or two areas you can improve rather than describing the whole performance as ‘terrible’. You might see that you need to speak more slowly or stop using phrases like ‘you know’.

Leave it a while and then watch the video again. This time listen to the reactions of the audience. Note when they reacted the way you expected them to and when they didn’t. Look for occasions where you didn’t give them enough time for the point to sink in.

Finally, watch the video a third time and listen to what you said. Compare it to what you had planned to say. Did you allow yourself to get distracted and miss an important point? Did you ignore a member of the audience who was trying to ask a question? Once you have looked at the video a number of times you will be able to see yourself objectively and appreciate what you did well and where you can improve.

The traditional way to evaluate a presentation is to ask the audience to complete ‘happy sheets’ which provide quantitative feedback. These are often badly used, do not used close questions that simply command a YES / No answer. Audience evaluation needs to be specific and measurable if it is to be useful. An evaluation which grades the individual elements of the presentation will enable you to look at the high- and low-scoring areas and, if you give the same presentation more than once, you can compare scores to see if you have maintained your performance in the better elements and improved where you needed to.

## Creating Bespoke Business Documents

A list of the types of bespoke documents that can be produced would be almost endless. The most common include:

* + letters and correspondence
  + emails
  + reports and proposals
  + minutes and agendas
  + invoices and financial payment documents such as credit notes and purchase orders
  + business cards
  + posters and notices
  + files relevant to your organisation
  + forms – the website [www.freebusinessforms.com](http://www.freebusinessforms.com/) lists over 700 different business form templates

Bespoke documents are simply documents that have been personalised for use by the organisation, a department within the organisation or an individual. They include stationery (such as compliments slips and business cards), promotional material (such as catalogues, brochures and leaflets) and forms (documents that require information to be filled in).

When designing bespoke documents, remember that documents are visual and make an impression on the reader or user based on the way they look, so you must give a great deal of thought to their format and layout. Poorly designed bespoke forms can affect the efficiency of the organisation and its reputation with customers, clients and the general public. Take the time to produce them well and you can improve the organisation’s image, reputation and performance.

When preparing bespoke documents, it is important to:

* + Use a consistent layout. There is a huge variety of fonts available and all of them can be used in different sizes and colours, together with italicising, bolding or using capital letters. However, most documents will benefit from using no more than two different fonts. In particular, long documents should retain a similar look and feel throughout as too much variation can confuse the reader.
  + Use different sizes of font and bold letters for headings and sub- headings to make the document easier to navigate. For instance, if the main text is in a font size of 12, a subheading could be size 14 and a main heading size 16.
  + Only create a design element that has a purpose. The design of your documents should help your content make its point, not overwhelm it. If in doubt, remember that ‘less is more’.
  + Think about spacing. People find it very difficult to read documents that are crammed full of text. Use white space to separate paragraphs and in the margins.
  + Use visual aids such as photographs, diagrams, graphs and charts to break up large blocks of text and make the document page more visually appealing. Remember that ‘a picture is worth a thousand words’.
  + Use colours. Colours attract the reader’s attention and are useful in directing the eye to a particularly important point. Remember to use colour sparingly, however, and not to make your documents look like the product of a small child’s art class. There are some colours whose use is traditional – such as red when indicating a negative in financial figures – and these conventions should be followed or the reader may become confused.
  + Use bullet points to summarise information and numbered lists to explain sequences of events or activities. Remember to be consistent when creating numbered lists: if you need item numbers, sub-item numbers, sub-sub-item numbers etc then decide on the style to use and stick to it.

## Letters and Correspondence

When producing letters and correspondence, you need to consider:

* + the paper colour if it is to be printed and posted
  + the receiver’s needs – will they be able to open a Word document or should the letter be embedded in the body of the email?
  + the text colour
  + the size and font of the text
  + the positioning of the organisation’s logo
  + the positioning of the organisation’s name and address, website, email address, telephone number, VAT registration number and company registration number

## Reports and Proposals

When producing reports and proposals, remember that a written report should provide information and facts as succinctly as possible. A formal report will contain the following:

* + A title that reflects the subject of the report.
  + A table of contents if the report is more than ten pages long.
  + An executive summary. This is written last and summarises the essential points of the report, including the conclusions as briefly as possible. It should be able to be read in isolation, allowing the reader to decide whether it is necessary to read the whole report.
  + An introduction explaining why the report has been written, giving background information and explaining the method of investigation used.
  + Main text where the findings of the report are listed under sections and subsections. Each section will refer to a different topic and describe, analyse, interpret and evaluate the data. Only proven facts should be used, not opinions at this stage.
  + Conclusion, which should sum up the main points. Opinions can be expressed if the evidence to support them is given in the main text. This may lead to recommendations.
  + Recommendations for improvements or actions based on the conclusions.
  + Bibliography listing the publications cited in the report or referred to when putting it together.
  + Appendix containing material which is referred to in the report which requires greater detail.

## Invoices and Purchase Orders

When producing invoices or purchase orders, there are a number of pieces of information which must be included. Microsoft have many templates available for these types of document:

* + the client’s or customer’s name and address
  + your organisation’s name, address, telephone number and email address
  + when you expect payment and by what method
  + an invoice number.

## E-Posters and Notices

When producing posters or notices:

* + Use all the space available, but remember that white space is an important part of the layout, and good use of it can make a poster elegant and arresting.
  + Use colour sparingly. Limited use of a few colours is more striking than a ‘rainbow’ approach. Think about why you are using colour; it is especially useful for emphasis and differentiation. Avoid colour combinations that clash (e.g red on blue) or cause problems for people with colour-blindness (e.g red and green next to each other)
  + Use white or pastel shades as background.
  + The flow of information should be clear from the layout; if you have to use arrows to indicate the flow, the content could probably be arranged better.
  + Clearly label diagrams or drawings and provide references to them in the text where necessary.
  + Keep the word count as low as possible.

## Customer Forms

When producing bespoke customer forms, you again need to consider the demographics of the people who will be filling them in. If they are for internal use there will be an opportunity for training to be provided, so less information may need to be given on the form itself and some jargon may be acceptable. When designing forms for completion by customers or the general public, it is important to remember they may only ever complete the form once, so they will have no previous experience to fall back on and may find jargon or technical language confusing. In this case, notes explaining how to fill in the form should appear at the beginning. Consider customer needs – do they need the form printing or will they complete it online? Will you use a system such as Mailchimp or simply use a Microsoft App?

Other design tips when creating forms are:

* + use tick boxes wherever possible
  + signature boxes need to be a minimum of 60mm × 20mm (21⁄2 inches × 3⁄4 inch)
  + address boxes should be at least five lines deep
  + boxes for written answers should allow a 6mm (1⁄4 inch) space between lines.

## Templates and Mail-Merge Documents

When producing templates, you are usually looking to create a master that can be used, for example, in a mail merge. This allows you to use a word processing document to create personalised letters and pre- addressed envelopes or mailing labels for mass mailings. The mail out will contain fixed text – which will be the same in each output document – and variables – which act as placeholders that are replaced by text from the data source.

The data source is typically a spreadsheet or a database that has a field or column for each variable in the template. When the mail merge is run, the word processing system creates an output document for each row in the database, using the fixed text exactly as it appears in the template but substituting the data variables in the template with the values from the matching columns.

## Producing Bespoke Documents

Before producing bespoke documents, it is important to understand exactly what is required. You need to liaise closely with the user or department that requires the document in order to agree the purpose of the document and the content, style and quality that is required. In some organisations there is a manager or even a department responsible for checking that all documentation meets the organisation’s standards and uses the agreed house style. In these organisations, new or amended documents must be approved before being put into use.

Text and non-text can be integrated by inserting pictures, graphs and clip art. There are a variety of different features that can be used in word-processing programs. Other applications help with integrating text and non-text into spread sheets and slides. The benefits of agreeing the purpose, content and style for the content of documents are that documents are standardised across the organisation and there are no poorly designed or poorly produced documents giving a bad impression of the organisation to customers or clients.

It is also important to agree a deadline for the design and production of the document. A fabulous, award-winning brochure giving details of an event in August is completely worthless if it is not completed until mid-September. It may be necessary to research the information needed to complete the document. The research may be carried out internally, by checking on facts and figures, or externally. External research will mostly be carried out on the internet, using search engines.

Bespoke documents could be created using:

* Publisher
* Word
* Canva
* Add more here from Sinead

It is important in order to gain approval for the bespoke document that it is checked for spelling, grammar and punctuation. Remember that spell checking facilities on your computer will only find some errors – it cannot tell whether you meant to say ‘its’ or ‘it’s’, or spot correct common typing errors such as ‘form’ for ‘from’ or ‘then’ for ‘than’, for instance.

Check that it is set to English (UK) rather than English (US) or it will insist on changing words like ‘organisation’ to ‘organization’.