(Tab 9) and coherence (Tab 9); save mechanical corrections, like spelling and punctuation, for later. See also ethics in writing (Tab 1).

Finally, for important documents, consider having others review your writing and make suggestions for improvement. For collaborative writing, of course, team members must review each other's work on segments of the document as well as the final master draft. For further advice and useful checklists, see revision (Tab 1) and proofreading (Tab 1).

1

The Writing Process

Preview

The "Five Steps to Successful Writing" essay (page xxiii) describes a systematic approach to writing and functions as a diagnostic tool for assessing problems. That is, when you find that a document is not achieving its primary purpose, the five steps can help you pinpoint where a problem occurred. Was the audience not fully assessed? Is further research needed? Does the document need further revision? Many of the entries in this section expand on the topics introduced in the "Five Steps," such as audience, collaborative writing, selecting the medium, writing a draft, and others. Entries related to the research process, including such topics as finding, evaluating, and using sources, appear in Tab 2, "Research and Documentation."

audience

Considering the needs of your audience is crucial to achieving your purpose. When you are writing to a specific reader, for example, you may find it useful to visualize a reader sitting across from you as you write. (See correspondence, Tab 6.) Likewise, when writing to an audience composed of relatively homogeneous readers, you might create an image of a composite reader and write for *that* reader. In such cases, using the "you" viewpoint (Tab 9) and an appropriate tone (Tab 9) will help you meet the needs of your readers as well as achieve an effective business writing style (Tab 9). For meeting the needs of an audience composed of listeners, see presentations (Tab 8).

Analyzing Your Audience's Needs

The first step in analyzing your audience is to determine the readers' needs relative to your purpose and goals. Ask key questions during preparation.

- Who specifically is your reader? Do you have multiple readers? Who needs to see or use the document?
- What do your readers already know about your subject? What are your readers' attitudes about the subject? (Skeptical? Supportive? Anxious? Bored?)
- What particular information about your readers (experience, training, and work habits, for example) might help you write at the appropriate level of detail?
- What does the context suggest about the readers' expectations for content or layout and design (Tab 5)?
- Do you need to adapt your message for international readers? If so, see global communication, global graphics (Tab 5), and international correspondence (Tab 6).

In the workplace, your readers are usually less familiar with the subject than you are. You have to be careful, therefore, when writing on a topic that is unique to your area of specialization. Be sensitive to the needs of those whose training or experience lies in other areas; provide definitions of nonstandard terms and explanations of principles that you, as a specialist, take for granted. See also defining terms.

Writing for Diverse Audiences

For documents aimed at multiple audiences with different needs, consider segmenting the document for different groups of readers: an executive summary for top managers, an appendix with detailed data for technical specialists, and the body for those readers who need to make

decisions based on a detailed discussion. See also formal reports (Tab 4) and proposals (Tab 3).

When you have multiple audiences with various needs but cannot segment your document, first determine your primary or most important readers—such as those who will make decisions based on the document—and be sure to meet their needs. Then, meet the needs of secondary readers, such as those who need only some of the document's contents, as long as you do not sacrifice the needs of your primary readers. See also persuasion and "Five Steps to Successful Writing" (page xxiii).

collaborative writing

Collaborative writing occurs when two or more writers work together to produce a single document for which they share responsibility and decision-making authority. Collaborative writing teams are formed when (1) the size of a project or the time constraints imposed on it require collaboration, (2) the project involves multiple areas of expertise, or (3) the project requires the melding of divergent views into a single perspective that is acceptable to the whole team or to another group. A number of types of collaborations are possible, from the collaboration of a primary writer with a variety of contributors and reviewers to a highly interactive collaboration in which everyone on a team plays a relatively equal role in shaping the document.*

DIGITAL TIP WIKIS FOR COLLABORATIVE DOCUMENTS

Wikis are Web sites the content and organization of which can be quickly and easily edited by authorized users. Wikis allow geographically separated collaborators to coauthor documents by providing collaborators with basic editing functions and the ability to post comments or questions. A writer may post a document draft to a wiki, and then collaborators can edit the draft. The edits are tracked so that all users can see who revised what and when, thus reducing problems with tracking multiple versions. Wikis can be used also for sharing and distributing information, managing projects, and providing communication spaces for clients and customers. For more detailed information on wikis, go to <**bcs.bedfordstmartins.com/alredbwc**> and select *Digital Tips*, "Wikis for Collaborative Documents."

*For a discussion of various forms of collaboration, see "Building a Taxonomy and Nomenclature of Collaborative Writing to Improve Interdisciplinary Research and Practice" by Paul Benjamin Lowry, Aaron Curtis, and Michelle René Lowry in the *Journal of Business Communication* 41, no. 1 (January 2004): 66–99.

Tasks of the Collaborative Writing Team

The collaborating team strives to achieve a compatible working relationship by dividing the work in a way that uses each writer's expertise and experience to its advantage. The team should also designate a coordinator who will guide the team members' activities, organize the project, and ensure coherence and consistency within the document. The coordinator's duties can be determined by mutual agreement or, if the team often works together, assigned on a rotating basis.

Planning. The team conceptualizes the document to be produced as the members collectively identify the audience, purpose, context, and scope of the project. See also meetings (Tab 8) and "Five Steps to Successful Writing" (page xxiii).

At this stage, the team establishes a project plan that may include guidelines for communication among team members, version control (naming and managing document drafts), review procedures, and writing style standards that team members are expected to follow. The plan includes a schedule with due dates for outlines, drafts, reviews, revisions, and the final document. Milestone deadlines must be met, even if the drafts are not as polished as the individual writers would like: One missed deadline can delay the entire project.

Research and Writing. At this stage, the team assigns initial research tasks, reports its progress, creates a broad outline of the document (see outlining), and assigns writing tasks to individual team members, based on their expertise and the outline. Depending on the project, each team member further researches an assigned segment of the document, expands and develops the broad outline, and produces a draft from a detailed outline. See also research (Tab 2) and writing a draft.

Reviewing. Keeping the readers' needs and the document's purpose in mind, each team member critically yet diplomatically reviews the other team members' drafts, from the overall organization to the clarity

DIGITAL TIP REVIEWING COLLABORATIVE DOCUMENTS

Some Adobe Acrobat® applications and many word-processing packages have options for providing feedback on and tracking changes in the drafts of collaborators' documents. You can add text or voice annotations within the text, allowing collaborators to read or hear your comments and edits and to accept or reject each suggested change. For more on this topic, see <**bcs.bedfordstmartins.com/alredbwc**> and select *Digital Tips*, "Reviewing Collaborative Documents."

of each paragraph, and offers advice to help improve the writer's work. Team members can easily solicit feedback by sharing electronic files. Tracking and commenting features allow the reviewer to show the suggested changes without deleting the original text.

Revising. In this stage, individual writers evaluate their colleagues' reviews and accept, reject, or build on their suggestions. Then, the team coordinator can consolidate all drafts into a final master copy and maintain and evaluate it for consistency and coherence. See also revision.

Conflict

As you collaborate, be ready to tolerate some disharmony, but temper it with mutual respect. Team members may not agree on every subject, and differing perspectives can easily lead to conflict, ranging from mild differences over minor points to major showdowns. However, creative differences resolved respectfully can energize the team and, in fact, strengthen a finished document by compelling writers to reexamine assumptions and issues in unanticipated ways. See also listening (Tab 8).

Writer's Checklist: Writing Collaboratively

- ☑ Designate one person as the team coordinator.
- ☑ Identify the audience, purpose, context, and scope of the project.
- ☑ Create a project plan, including a schedule and standards.
- ☑ Create a working outline of the document.
- ☑ Assign segments or tasks to each team member.
- ☑ Research and write drafts of document segments.
- ☑ Follow the schedule: due dates for drafts, revisions, and final versions.
- ☑ Use the agreed-upon standard guide for style and format.
- ☑ Exchange segments for team member reviews.
- ☑ Revise segments as needed.
- ☑ Meet your established deadlines.

conclusions

The conclusion of a document ties the main ideas together and can clinch a final significant point. This final point may, for example, make a prediction or a judgment, summarize the key findings of a study, or recommend a course of action. Figure 1–1 is a conclusion from a proposal to reduce health-care costs by increasing employee fitness through

Conclusion and Recommendation

I recommend that ABO, Inc., participate in the corporate membership program at AeroFitness Clubs, Inc., by subsidizing employee memberships. By subsidizing memberships, ABO shows its commitment to the importance of a fit workforce. Club membership allows employees at all five ABO warehouses to participate in the program. The more employees who participate, the greater the long-term savings in ABO's health-care costs.

Enrolling employees in the corporate program at AeroFitness would allow them to receive a one-month, free trial membership. Those interested in continuing could then join the club and pay half of the one-time membership fee of $900 and receive a 30 percent discount on the $600 yearly fee. The other half of the membership fee ($450) would be paid for by ABO. If employees leave the company, they would have the option of purchasing ABO's share of the membership to continue at AeroFitness or selling their half of the membership to another ABO employee wishing to join AeroFitness.

Implementing this program will help ABO, Inc., reduce its health-care costs while building stronger employee relations by offering employees a desirable benefit. If this proposal is adopted, I have some additional thoughts about publicizing the program to encourage employee participation that I would be pleased to share.

FIGURE 1–1. Conclusion

health-club subsidies. Notice that it makes a recommendation, summarizes key points, and points out several benefits of implementing the recommendation.

The way you conclude depends on your purpose, your audiences' needs, and the context. For example, a lengthy sales proposal might conclude persuasively with a summary of the proposal's salient points and the company's relevant strengths. The following examples are typical concluding strategies.

RECOMMENDATION

Our findings suggest that you need to alter your marketing to adjust to the changing demographics for your products.

SUMMARY

As this report describes, we would attract more recent graduates with the following strategies:

1. Establish a Web site where students can register and submit online résumés.

2. Increase our advertising in local student newspapers and our attendance at college career fairs.
3. Expand our local co-op program.

JUDGMENT
Based on the scope and degree of the tornado's damage, the current construction code for roofing on light industrial facilities is inadequate.

IMPLICATION
Although our estimate calls for a substantially higher budget than in the three previous years, we believe that it is reasonable given our planned expansion.

PREDICTION
Although I have exceeded my original estimate for equipment, I have reduced my original labor estimate; therefore, I will easily stay within the original bid.

The concluding statement may merely present ideas for consideration, call for action, or deliberately provoke thought.

IDEAS FOR CONSIDERATION
The new prices become effective the first of the year. Price adjustments are routine for the company, but some of your customers will not consider them acceptable. Please bear in mind the needs of both your customers and the company as you implement these price adjustments.

CALL FOR ACTION
Please send us a check for $250 now if you wish to keep your account active. If you have not responded to our previous letters because of some special hardship, I will be glad to work out a solution with you personally.

THOUGHT-PROVOKING STATEMENT
Can we continue to accept the losses incurred by inefficiency? Or should we take the necessary steps to control it now?

Be especially careful not to introduce a new topic when you conclude. A conclusion should always relate to and reinforce the ideas presented earlier in your writing. Moreover, the conclusions must be consistent with what the introduction promised the report would examine (its purpose) and how it would do so (its method). See also introductions.

For guidance about the location of the conclusion section in a report, see formal reports (Tab 4). For letter and other short closings, see correspondence (Tab 6) and entries on specific types of documents throughout this book.

context

Context is the environment or circumstances in which writers produce documents and within which readers interpret their meanings. Everything is written in a context, as illustrated in many entries and examples throughout this book. This entry considers specifically the effect of context on documents and suggests how you can be aware of it as you write. See also audience and purpose.

The context for any document, such as a proposal or report, is determined by interrelated events or circumstances both inside and outside an organization.* For example, when you write a proposal to fund a project within your company, the economic condition of that company is part of the context that will determine how your proposal is received. If the company has recently laid off a dozen employees, its management may not be inclined to approve a proposal to expand its operations—regardless of how well the proposal is written.

When you correspond with someone, the events that prompted you to write shape the context of the message and will affect what you say and how you say it. If you write to a customer in response to a complaint, for example, the tone and approach of your message will be determined by the context—what you find when you investigate the issue. Is your company fully or partly at fault? Has the customer incorrectly used a product? contributed to a problem? (See also adjustments, Tab 6.) If you write instructions for office staff who must use high-volume document-processing equipment, other questions will reveal the context. What are the lighting and other physical conditions near the equipment? Will these physical conditions affect the layout and design of the instructions? What potential safety issues might the users encounter? See also layout and design (Tab 5).

Assessing Context

Each time you write, you should keep in mind and even visualize the context so that you are sure your document will achieve its purpose. The following questions are starting points to help you become aware of the context, how it will influence your approach and your readers' interpretation of what you have written, and how it will affect the decisions you need to make during the writing process. See also "Five Steps to Successful Writing" (page xxiii).

*For a detailed illustration of specific documents that have been affected by factors within particular contexts, see Linda Driskill, "Understanding the Writing Context in Organizations," in *Central Works in Technical Communication*, ed. Johndan Johnson-Eilola and Stuart Selber (New York: Oxford University Press, 2004), 55–69.

- What is your professional relationship with your readers and how might that affect the tone, style, and scope of your writing? See also Tab 9, "Style and Clarity."
- What is "the story" behind the immediate reason you are writing; that is, what series of events or perhaps previous documents led to your need to write?
- What is the preferred medium of your readers? See also selecting the medium.
- What specific factors, such as competition, finance, and regulation, are recognized within an organization or a department as important?
- What is the corporate culture in which your readers work, and what are the key values that you might find in its mission statement?
- What are the professional relationships among the specific readers who will receive the document?
- What current events within or outside an organization or a department may influence how readers interpret your writing?
- What national cultural differences might affect your readers' expectations or interpretations of the document? See also global communication.

As these questions suggest, context is very specific each time you write and often involves, for example, the history of a specific organization or your past dealings with individual readers.

Signaling Context

Because context is so important, it is often helpful to remind your reader in some way of the context for your writing, as in the following opening for a cover message to a proposal.

- During our meeting on improving quality last week, you mentioned that we have previously required usability testing only for documents going to high-profile clients because of the costs involved. As I considered that practice, the idea occurred to me that we might try less extensive usability testing for many of our other clients. Because you suggested that you would welcome new ideas, I have proposed in the attached document a method of limited usability testing for a broad range of clients in order to improve overall quality.

Of course, as described in introductions, providing context for a reader may require only a brief background statement or short reminders.

- Several weeks ago, a financial adviser noticed a recurring problem in the software developed by Datacom Systems. Specifically, error messages repeatedly appeared when, in fact, no specific trouble . . .
- Jane, as I promised in my e-mail yesterday, I've attached the personnel budget estimates for the next fiscal year.

As the last example suggests, always provide some context when you send an e-mail with attachments. See also e-mail (Tab 6).

defining terms

Defining key terms and concepts is often essential for clarity. Terms can be defined either formally or informally, depending on your purpose, your audience, and the context. A *formal definition* is a form of classification. You define a term by placing it in a category and then identifying the features that distinguish it from other members of the same category.

TERM	CATEGORY	DISTINGUISHING FEATURES
An *auction* is	a public sale	in which property passes to the highest bidder through successively increased offers.

An *informal definition* explains a term by giving a more familiar word or phrase as a synonym.

- Plants have a *symbiotic*, or *mutually beneficial*, relationship with certain kinds of bacteria.

State definitions in a positive way; focus on what the term *is* rather than on what it is not.

NEGATIVE	In a legal transaction, *real property* is not personal property.
POSITIVE	*Real property* is legal terminology for the right or interest a person has in land and the permanent structures on that land.

Avoid circular definitions, which merely restate the term to be defined and therefore fail to clarify it.

CIRCULAR	*Spontaneous combustion* is fire that begins spontaneously.
REVISED	*Spontaneous combustion* is the self-ignition of a flammable material through a chemical reaction.

In addition, avoid "is when" and "is where" definitions. Such definitions fail to include the category and are indirect.

- A contract is ~~when two or more parties agree to something~~ *a binding agreement between two or more parties*.

description

The key to effective description is the accurate presentation of details, whether for simple or complex descriptions. In Figure 1–2, notice that the simple description contained in the purchase order includes five specific details (in addition to the part number) structured logically.

PURCHASE ORDER

PART NO.	DESCRIPTION	QUANTITY
IW 8421	Infectious-waste bags, 12″ × 14″, heavy-gauge polyethylene, red double closures with self-sealing adhesive strips	5 boxes containing 200 bags per box

FIGURE 1–2. Simple Description

Complex descriptions, of course, involve more details. In describing a mechanical device, for example, describe the whole device and its function before giving a detailed description of how each part works. The description should conclude with an explanation of how each part contributes to the functioning of the whole.

In descriptions intended for readers who are unfamiliar with the topic, details are crucial. For these readers, show or demonstrate (as opposed to "tell") primarily through the use of images and details. Notice the use of color, shapes, and images in the following description of a company's headquarters. The writer assumes that the reader knows such terms as *colonial design* and *haiku fountain*.

- Their corporate headquarters, which reminded me of a rural college campus, are located north of the city in a 90-acre lush green wooded area. The complex consists of five three-story buildings of colonial design. The buildings are spaced about 50 feet apart and are built in a U shape surrounding a reflection pool that frames a striking haiku fountain. . . .

You can also use analogy to explain unfamiliar concepts in terms of familiar ones, such as "U shape" in the previous example. See also figures of speech (Tab 9).

Visuals can be powerful aids in descriptive writing. For a discussion of how to incorporate visual material into text, see Tab 5, "Design and Visuals."

ethics in writing

Ethics refers to the choices we make that affect others for good or ill. Ethical issues are inherent in writing and speaking because what we write and say can influence others. Further, how we express ideas affects our readers' perceptions of us and our company's ethical stance.

ETHICS NOTE Obviously, no book can describe how to act ethically in every situation, but this entry describes some typical ethical lapses to watch for during revision.* In other entries throughout this book, ethical issues are highlighted using the symbols surrounding this paragraph. ✦

Avoid language that attempts to evade responsibility. Some writers use the passive voice (Tab 11) because they hope to avoid responsibility or to obscure an issue: "It has been decided" [*Who* has decided?] or "Several mistakes were made" [*Who* made them?].

Avoid deceptive language. Do not use words with more than one meaning to circumvent the truth. Consider the company document that stated, "A nominal charge will be assessed for using our facilities." When clients objected that the charge was actually very high, the writer pointed out that the word *nominal* means "the named amount" as well as "very small." In that situation, clients had a strong case in charging that the company was attempting to be deceptive. Various abstract words (Tab 9), technical and legal jargon (Tab 9), and euphemisms (Tab 9) are unethical when they are used to mislead readers or to hide a serious or dangerous situation, even though technical or legal experts could interpret them as accurate. See also word choice (Tab 9).

Do not deemphasize or suppress important information. Not including information that a reader would want to have, such as potential safety hazards or hidden costs for which a customer might be responsible, is unethical and possibly illegal. Likewise, do not hide information in dense paragraphs with small type and little white space, as is common in credit-card contracts. Use layout and design (Tab 5) features like type

*Adapted from Brenda R. Sims, "Linking Ethics and Language in the Technical Communication Classroom," *Technical Communication Quarterly* 2, no. 3 (Summer 1993): 285–99.

size, bullets, lists, and footnotes to highlight information that is important to readers.

Do not emphasize misleading or incorrect information. Similarly, avoid the temptation to highlight a feature or service that readers would find attractive but that is available only with some product models or at extra cost. (See also logic errors, Tab 9, and positive writing, Tab 9.) Readers could justifiably object that you have given them a false impression to sell them a product or service, especially if you also deemphasize the extra cost or other special conditions.

In general, treat others—individuals, companies, groups—with fairness and with respect. Avoid using language that is biased, racist, or sexist or that perpetuates stereotypes. See also biased language (Tab 9).

Finally, be aware that both plagiarism (Tab 2) and violations of copyright (Tab 2) not only are unethical but also can have serious professional and legal consequences for you in the classroom and on the job.

Writer's Checklist: Writing Ethically

Ask yourself the following questions:

- ☑ *Am I willing to take responsibility, publicly and privately, for what I have written?* Make sure you can stand behind what you have written.
- ☑ *Is the document or message honest and truthful?* Scrutinize findings and conclusions carefully. Make sure that the data support them.
- ☑ *Am I acting in my employer's, my client's, the public's, or my own best long-term interest?* Have someone outside your company review and comment on what you have written.
- ☑ *Does the document or message violate anyone's rights?* If information is confidential and you have serious concerns, consider a review by the company's legal staff or an attorney.
- ☑ *Am I ethically consistent in my writing?* Apply consistently the principles outlined here and those you have assimilated throughout your life to meet this standard.
- ☑ *What if everybody acted or communicated in this way?* If you were the intended reader, would the message be acceptable and respectful?

If the answers to these questions do not come easily, consider asking a trusted colleague to review and comment on what you have written.

global communication

The prevalence of global communication technology and international markets means that the ability to communicate with audiences from varied cultural backgrounds is essential. The audiences for such communications include clients and customers as well as business partners and colleagues.

Entries in this book—such as meetings (Tab 8) and résumés (Tab 7)—are based on U.S. cultural patterns. The treatment of such topics might be very different in other cultures where leadership styles, persuasive strategies, and even legal constraints differ. As illustrated in international correspondence (Tab 6), organizational patterns, forms of courtesy, and ideas about efficiency can vary significantly from culture to culture. What might be seen as direct and efficient in the United States could be seen as blunt and even impolite in other cultures. The reasons behind these differing ways of viewing communication are complex. Those who study cultures have found various ways to measure cultural differences, such as individual versus group orientation, the importance of saving face, and conceptions of time.

Anthropologist Edward T. Hall, a pioneer in cross-cultural research, developed the concept of "contexting" to assess the predominant communication style of a culture.* By "context," Hall means how much or how little an individual assumes another person understands about a subject under discussion. In a very low-context communication, the participants assume they share little knowledge and must communicate in great detail. Low-context cultures tend to assume little prior knowledge on the part of those with whom they communicate; thus, thorough documentation is important—written agreements (contracts) are expected, and rules are explained in detail.

In a high-context communication, the participants already understand the context and thus do not feel a need to exchange much background information. High-context cultures depend on shared history (context) to relate to each other. Thus, words and written contracts are not so important, while personal relationships are paramount. Of course, no culture is entirely high or low context; rather, these concepts can help you communicate more effectively to those in a particular culture.†

Writer's Checklist: Communicating Globally

- ☑ Acknowledge diversity within your organization. Discussing the differing cultures within your company or region will reinforce the idea that people can interpret verbal and nonverbal communications differently.
- ☑ Invite global and intercultural communication experts to speak at your workplace. Companies in your area may have employees who could be resources for cultural discussions.

*Edward Twitchell Hall and Mildred Reed Hall, *Understanding Cultural Differences: Germans, French and Americans* (Yarmouth, Maine: Intercultural Press, 1990).

†Gerald J. Alred, "Teaching in Germany and the Rhetoric of Culture," *Journal of Business and Technical Communication* 11, no. 3 (July 1997): 353–78.

Writer's Checklist: Communicating Globally (continued)

- ☑ Understand that the key to effective communication with global audiences is recognizing that cultural differences, despite the challenges they may present, offer opportunities for growth for both you and your organization.
- ☑ Consult with someone from your intended audience's culture. Many phrases, gestures, and visual elements are so subtle that only someone who is very familiar with the culture can explain the effect they may have on others from that culture. See also global graphics (Tab 5).

WEB LINK INTERCULTURAL RESOURCES

Intercultural Press publishes "books and training materials that help professionals, businesspeople, travelers, and scholars understand the meaning and diversity of culture." (See <**www.interculturalpress.com/**>.) For other resources for global communication, see <**bcs.bedfordstmartins.com/alredbwc**> and select *Links for Business Writing.*

introductions

Every document must have either an opening or an introduction. In general, correspondence (Tab 6) and routine reports (Tab 3) need only an opening; more complex reports and other longer documents need an introduction. An opening usually simply focuses the reader's attention on your topic and then proceeds to the body of your document. A formal introduction, however, sets the stage for the discussion that follows in the body of your document by providing information necessary to understand what follows. Introductions are required for such documents as formal reports (Tab 4) and major proposals (Tab 3). For a discussion of comparable sections for Web sites, see writing for the Web and Web design (Tab 5).

Routine Openings

When your audience is familiar with your topic or if what you are writing is brief or routine, then a simple opening will provide adequate context, as shown in the following examples:

LETTER

Dear Mr. Ignatowski:
You will be happy to know that we have corrected the error in your bank balance. The new balance shows . . .

MEMO

To date, 18 of the 20 specimens your department submitted for analysis have been examined. Our preliminary analysis indicates . . .

E-MAIL

Jane, as I promised in my e-mail yesterday, I've attached the human resources budget estimates for fiscal year 2008.

Opening Strategies

Opening strategies are aimed at focusing the readers' attention and motivating them to read the entire document.

Objective. In reporting on a project, you might open with a statement of the project's objective so that the readers have a basis for judging the results.

- The primary goal of this project was to develop new techniques to solve the problem of waste disposal. Our first step was to investigate . . .

Problem Statement. One way to give readers the perspective of your report is to present a brief account of the problem that led to the study or project being reported.

- Several weeks ago a financial adviser noticed a recurring problem in the software developed by Datacom Systems. Specifically, error messages repeatedly appeared when, in fact, no specific trouble. . . . After an extensive investigation, we found that Datacom Systems. . . .

For proposals or formal reports, of course, problem statements may be more elaborate and a part of the full-scale introduction, which is discussed later in this entry.

Scope. You may want to present the scope of your document in your opening. By providing the parameters of your material, the limitations of the subject, or the amount of detail to be presented, you enable your readers to determine whether they want or need to read your document.

- This pamphlet provides a review of the requirements for obtaining a private pilot's license. It is not intended as a textbook to prepare you for the examination itself; rather, it outlines the steps you need to take and the costs involved.

Background. The background or history of a subject may be interesting and lend perspective and insight to a subject. Consider the following example from a newsletter describing the process of oil drilling:

- From the bamboo poles the Chinese used when the pyramids were young to today's giant rigs drilling in hundreds of feet of water, there has been considerable progress in the search for oil. But whether in ancient China or a modern city, underwater or on a mountaintop, the objective of drilling has always been the same—to manufacture a hole in the ground, inch by inch.

Summary. You can provide a summary opening by describing in abbreviated form the results, conclusions, or recommendations of your article or report. Be concise: Do not begin a summary by writing "This report summarizes. . . ."

CHANGE This report summarizes the advantages offered by the photon as a means of examining the structural features of the atom.

TO As a means of examining the structure of the atom, the photon offers several advantages.

Interesting Detail. Often an interesting detail will attract the readers' attention and pique their curiosity. Readers of an annual report for a manufacturer of telescopes and scientific instruments, for example, may be persuaded to invest if they believe that the company is developing innovative, cutting-edge products.

- The rings of Saturn have puzzled astronomers ever since they were discovered by Galileo in 1610 using the first telescope. Recently, even more rings have been discovered. . . .

  Our company's Scientific Instrument Division designs and manufactures research-quality, computer-controlled telescopes that promise to solve the puzzles of Saturn's rings by enabling scientists to use multicolor differential photometry to determine the rings' origins and compositions.

Definition. Although a definition can be useful as an opening, do not define something with which your audience is familiar or provide a definition that is obviously a contrived opening (such as "Webster defines technology as . . ."). A definition should be used as an opening only if it offers insight into what follows.

- *Risk* is often a loosely defined term. In this report, risk refers to a qualitative combination of the probability of an event and the severity of the consequences of that event. In fact, . . .

Anecdote. An anecdote can be used to attract and build interest in a subject that may otherwise be mundane; however, this strategy is best suited to longer documents and presentations (Tab 8).

- In his poem "The Calf Path" (1895), Sam Walter Foss tells of a wandering, wobbly calf trying to find its way home at night through the lonesome woods. It made a crooked path, which was taken up the next day by a lone dog. Then "a bellwether sheep pursued the trail over vale and steep, drawing behind him the flock, too, as all good bellwethers do." This forest path became a country lane that bent and turned and turned again. The lane became a village street, and at last the main street of a flourishing city. The poet ends by saying, "A hundred thousand men were led, by a calf near three centuries dead."

  Many companies today follow a "calf path" because they react to events rather than planning. . . .

Quotation. Occasionally, you can use a quotation to stimulate interest in your subject. To be effective, however, the quotation must be pertinent—not some loosely related remark selected from a book of quotations.

- Richard Smith, founder of PCS Corporation, recently said, "I believe that managers need to be more 'people smart' than ever before. The management style of today involves much more than just managing the operations of a department—it requires understanding the personalities that comprise a corporation." His statement represents a growing feeling among corporate leaders that. . . .

Forecast. Sometimes you can use a forecast of a new development or trend to gain the audience's attention and interest.

- In the not-too-distant future, we may be able to use a handheld medical diagnostic device similar to those in science fiction to assess the complete physical condition of accident victims. This project and others are now being developed at The Seldi Group, Inc.

Persuasive Hook. While all opening strategies contain persuasive elements, the hook uses persuasion most overtly. A brochure touting the newest innovation in tax-preparation software might address readers as follows:

- Welcome to the newest way to do your taxes! TaxPro EZ ends the headache of last-minute tax preparation with its unique Web-Link feature.

Full-Scale Introductions

The purpose of a full-scale introduction is to give readers enough general information about the subject to enable them to understand the details in the body of the document. An introduction should accomplish any or all of the following:

- *State the subject.* Provide background information, such as definition, history, or theory, to provide context for your readers.
- *State the purpose.* Make your readers aware of why the document exists and whether the material provides a new perspective or clarifies an existing perspective.
- *State the scope.* Tell readers the amount of detail you plan to cover.
- *Preview the development of the subject.* Especially in a longer document, outline how you plan to develop the subject. Providing such information allows readers to anticipate how the subject will be presented and helps them evaluate your conclusions or recommendations.

Consider writing an opening or introduction last. Many writers find that it is only when they have drafted the body of the document that they have a full enough perspective on the subject to introduce it adequately.

organization

A well-organized document enables your readers to grasp how the pieces of your subject fit together as a coherent whole. An organized document or presentation is based on an effective outline produced from a method of development that suits your subject, fulfills your purpose, and satisfies the needs of your audiences for shape and structure. Following are the most common methods of developing any document—from an e-mail to a formal report to a Web page. See also outlining.

- *Cause-and-effect development* begins with either the cause or the effect of an event. For example, if you were reporting on an airplane accident, you might start your report with the causes and lead up to the accident itself. Conversely, you might start with a description of the accident and trace the events back to the cause. This approach can also be used to develop a report that offers a solution to a problem, beginning with the problem and moving on to the solution, or vice versa.
- *Chronological development* emphasizes the time element of a sequence. For example, a Federal Aviation Administration (FAA) report on an airplane crash might begin with takeoff and proceed in segments of time to the crash.
- *Comparison* is useful when writing about a new topic that is in many ways similar to another, more familiar topic. For example, an online tutorial for a new operating system might compare that system to one that is familiar to the users.
- *Division* separates a whole into component parts and discusses each part separately. Division could be used, for example, to report on a multinational organization by describing its various operations.
- *Classification* groups parts into categories that clarify the relationship of the parts. For example, you might discuss local retail businesses by grouping them according to common demographic features of their target customers (such as age, household income, occupation).
- *General and specific development* proceeds either from general information to specific details or from specific information to a general conclusion. If you are writing about a new software product, for example, you might begin with a general statement of the function of the total software package, then explain the functions of the major routines in the package, and finally describe the functions of the various subroutines. Conversely, you might describe a software problem in a minor application and then trace it to a larger, more global problem with the software.
- *Order-of-importance development* presents information in either decreasing order of importance, as in a proposal that begins with the most important point, or increasing order of importance, as in a presentation that ends with your most important point.
- *Sequential development* emphasizes the order of elements in a process and is particularly useful when writing step-by-step instructions.
- *Spatial development* describes the physical appearance of an object or area (such as a room) from top to bottom, inside to outside, front to back, and so on. A crime-scene report might start at the site of the crime and proceed in concentric areas from that point.

Documents often blend methods of development. For example, in a report that describes the organization of a company, you might use elements from three methods of development. You could divide the larger topic (the company) into operations (division and classification), arrange the operations according to what you see as their impact within the company (order of importance), and present their manufacturing operations in the order they occur (sequential). As this example illustrates, when outlining a document, you may base your major division on one primary method of development appropriate to your purpose and then subordinate other methods to it.

During organization, you must consider a design and layout that will be helpful to your reader and a format appropriate to your subject and purpose. If you intend to include visuals, plan them as you complete your outline, especially if they need to be prepared by someone else while you are writing and revising the draft. See also Tab 3, "Business Writing Documents and Elements," and Tab 5, "Design and Visuals."

outlining

An outline—the skeleton of the document you are going to write structures your writing by ensuring that it has a beginning (introduction), a middle (main body), and an end (conclusion). An outline provides the foundation for coherence (Tab 9) so that relationships between ideas are clear and one part flows smoothly to the next. An outline also helps with collaborative writing by enabling a team to refine a project's scope, divide responsibilities, and maintain focus.

Types of Outlines

Two types of outlines are most common: short topic outlines and lengthy sentence outlines. A *topic outline* consists of short phrases arranged to reflect your primary method of development. (See also organization.) A topic outline is especially useful for short documents such as e-mails, letters, or memos. See also correspondence (Tab 6).

For a large writing project, create a topic outline first, and then use it as a basis for creating a sentence outline. A *sentence outline* summarizes each idea in a complete sentence that may become the topic sentence for a paragraph in the rough draft. If most of your notes can be shaped into topic sentences for paragraphs in your rough draft, you can be relatively sure that your document will be well organized. See also note-taking (Tab 2) and research (Tab 2).

Creating an Outline

When you are outlining large and complex subjects with many pieces of information, the first step is to group related notes into categories. Sort the notes by major and minor division headings. Use an appropriate method of development to arrange items and label them with Roman numerals. For example, the major divisions for this discussion of outlining could be as follows:

I. Advantages of outlining
II. Types of outlines
III. Creating an outline

The second step is to establish your minor divisions within each major division. Arrange your minor points using a method of development under their major division and label them with capital letters.

II. Types of outlines
  A. Topic outlines
  B. Sentence outlines
  Division and Classification

III. Creating an outline
  A. Establish major and minor divisions.
  B. Sort notes by major and minor divisions.
  C. Complete the sentence outline.
  Sequential

You will sometimes need more than two levels of headings. If your subject is complicated, you may need three or four levels of headings to better organize all of your ideas in proper relationship to one another. In that event, use the following numbering scheme:

I. First-level heading
  A. Second-level heading
    1. Third-level heading
      a. Fourth-level heading

The third step is to mark each of your notes with the appropriate Roman numeral and capital letter. Arrange the notes logically within each minor heading, and mark each with the appropriate, sequential Arabic number. As you do, make sure your organization is logical and your headings have parallel structure (Tab 9). For example, all the second-level headings under "III. Creating an outline" are complete sentences in the active voice (Tab 11).

Treat visuals as an integral part of your outline, and plan approximately where each should appear. Either include a rough sketch of the visual or write "illustration of . . ." at each place. As with other information in an outline, freely move, delete, or add visuals as needed. See also Tab 5, "Design and Visuals."

The outline samples shown earlier use a combination of numbers and letters to differentiate the various levels of information. You could also use a decimal numbering system, such as the following, for your outline.

1. FIRST-LEVEL HEADING
  1.1 Second-level heading
  1.2 Second-level heading
    1.2.1 Third-level heading
    1.2.2 Third-level heading
      1.2.2.1 Fourth-level heading
      1.2.2.2 Fourth-level heading
  1.3 Second-level heading
2. FIRST-LEVEL HEADING

This system should not go beyond the fourth level because the numbers get too cumbersome beyond that point. In many documents, such as policies and procedures, the decimal numbering system is carried over from the outline to the final version of the document for ease of cross-referencing sections.

Create your draft by converting your notes into complete sentences and paragraphs. If you have a sentence outline, the most difficult part of the writing job is over. However, whether you have a topic or a sentence outline, remember that an outline is not set in stone; it may need to change as you write the draft, but it should always be your point of departure and return. See writing a draft.

paragraphs

A paragraph performs three functions: (1) It develops the unit of thought stated in the topic sentence; (2) it provides a logical break in the material; and (3) it creates a visual break on the page, which signals a new topic.

Topic Sentence

A topic sentence states the paragraph's main idea; the rest of the paragraph supports and develops that statement with related details. The topic sentence is often the first sentence because it tells the reader what the paragraph is about.

- *The cost of training new employees is high.* In addition to the cost of classroom facilities and instructors, an organization must pay employees their regular salary while they sit in the classroom. For the companies to break even on this investment in their professional employees, those employees must stay in the job for which they have been trained for at least one year.

The topic sentence is usually most effective early in the paragraph, but a paragraph can lead to the topic sentence, which is sometimes done to achieve emphasis (Tab 9).

- Energy does far more than simply make our daily lives more comfortable and convenient. Suppose you wanted to stop—and reverse—the economic progress of this nation. What would be the surest and quickest way to do it? Find a way to cut off the nation's oil resources! . . . The economy would plummet into the abyss of national economic ruin. *Our economy, in short, is energy-based.*
  —*The Baker World* (Los Angeles: Baker Oil Tools)

On rare occasions, the topic sentence may logically fall in the middle of a paragraph.

- . . . [It] is time to insist that science does not progress by carefully designed steps called "experiments," each of which has a well-defined beginning and end. *Science is a continuous and often a disorderly and accidental process.* We shall not do the young psychologist any favor if we agree to reconstruct our practices to fit the pattern demanded by current scientific methodology.
  —B. F. Skinner, "A Case History in Scientific Method"

Paragraph Length

A paragraph should be just long enough to deal adequately with the subject of its topic sentence. A new paragraph should begin whenever the subject changes significantly. A series of short, undeveloped paragraphs can indicate poor organization and sacrifice unity by breaking a single idea into several pieces. A series of long paragraphs, however, can fail to provide the reader with manageable subdivisions of thought. Paragraph length should aid the reader's understanding of ideas.

Occasionally, a one-sentence paragraph is acceptable if it is used as a transition (Tab 9) between longer paragraphs or as a one-sentence introduction or conclusion in correspondence (Tab 6).

Writing Paragraphs

Careful paragraphing reflects the writer's logical organization and helps the reader follow the writer's thoughts. A good working outline makes it easy to group ideas into appropriate paragraphs. (See also outlining.) Although paragraphs can vary from their outlines, the following partial topic outline plots the course of the subsequent paragraphs:

TOPIC OUTLINE (PARTIAL)

I. Advantages of Chicago as location for new facility
   A. Transport infrastructure
      1. Rail
      2. Air
      3. Truck
      4. Sea (except in winter)
   B. Labor supply
      1. Engineering and scientific personnel
         a. Similar companies in area
         b. Major universities
      2. Technical and manufacturing personnel
         a. Community college programs
         b. Custom programs

RESULTING PARAGRAPHS

Probably the greatest advantage of Chicago as a location for our new facility is its excellent transport facilities. The city is served by three major railroads. Both domestic and international air-cargo service are available at O'Hare International Airport; Midway Airport's convenient location adds flexibility for domestic air-cargo service. Chicago is a major hub of the trucking industry, and most of the nation's large freight carriers have terminals there. Finally, except in the winter months when the Great Lakes are frozen, Chicago is a seaport, accessible through the St. Lawrence Seaway.

Chicago's second advantage is its abundant labor force. An ample supply of engineering and scientific staff is assured not only by the presence of many companies engaged in activities similar to ours but also by the presence of several major universities in the metropolitan area. Similarly, technicians and manufacturing personnel are in abundant supply. The colleges in the Chicago City College system, as well as half a dozen other two-year colleges in the outlying areas, produce graduates with associate's degrees in a wide variety of technical specialties appropriate to our needs. Moreover, three of the outlying colleges have expressed an interest in developing off-campus courses attuned specifically to our requirements.

Paragraph Unity and Coherence

A good paragraph has unity (Tab 9) and coherence (Tab 9) as well as adequate development. *Unity* is singleness of purpose, based on a topic sentence that states the core idea of the paragraph. When every sentence in the paragraph develops the core idea, the paragraph has unity.

Coherence is holding to one point of view, one attitude, one tense; it is the joining of sentences into a logical pattern. A careful choice of transitional words ties ideas together and thus contributes to coherence in a paragraph. Notice how the boldfaced, italicized words tie together the ideas in the following paragraph.

TOPIC SENTENCE *Over the past several months, I have heard complaints about the Merit Award Program.* ***Specifically***, many employees feel that this program should be linked to annual ***salary increases***. They believe that ***salary increases*** would provide a much better incentive than the current $500 to $700 cash awards for exceptional service. ***In addition***, these ***employees believe*** that their supervisors consider the cash awards a satisfactory alternative to salary increases. Although I don't think this practice is widespread, the fact that the ***employees believe*** that it is justifies a reevaluation of the Merit Award Program.

Simple enumeration (*first, second, then, next,* and so on) also provides effective transition within paragraphs. Notice how the boldfaced, italicized words and phrases give coherence to the following paragraph.

- Most adjustable office chairs have nylon tubes that hold metal spindle rods. To keep the chair operational, lubricate the spindle rods occasionally. ***First***, loosen the set screw in the adjustable bell. ***Then*** lift the chair from the base. ***Next***, apply the lubricant to the spindle rod and the nylon washer. ***When you have finished***, replace the chair and tighten the set screw.

persuasion

Persuasive writing attempts to convince an audience to adopt the writer's point of view or take a particular action. Workplace writing often uses persuasion to reinforce ideas that readers already have, to convince readers to change their current ideas, or to lobby for a particular suggestion or policy (as in Figure 1–3). You may find yourself pleading for safer working conditions, justifying the expense of a new program, or writing a proposal (Tab 3) for a large purchase. See also context and purpose.

In persuasive writing, the way you present your ideas is as important as the ideas themselves. You must support your appeal with logic and a sound presentation of facts, statistics, and examples. See also logic errors (Tab 9).

A writer also gains credibility, and thus persuasiveness, through the readers' impressions of the document's appearance. For this reason, consider carefully a document's layout and design (Tab 5). See also résumés (Tab 7).

ETHICS NOTE Avoid ambiguity: Do not wander from your main point, and above all, never make false claims. You should also acknowledge any real or potentially conflicting opinions; doing so allows you to anticipate and overcome objections and builds your credibility. See also ethics in writing and promotional writing. ✦

The memo shown in Figure 1–3 was written to persuade the marketing staff to accept and participate in a change to a new computer system. Notice that not everything in this memo is presented in a positive light. Change brings disruption, and the writer acknowledges that fact. See also "you" viewpoint (Tab 9).

Interoffice Memo

TO: Marketing Staff
FROM: Harold Kawenski, MIS Administrator HK
DATE: April 21, 2008
SUBJECT: Plans for the Changeover to the New Computer System

As you all know, the merger with Datacom has resulted in dramatic growth in our workload—a 30 percent increase in our customer support services during the last several months. To cope with this expansion, we will soon install the NRT/R4 server and QCS Enterprise software with Web-based applications.

Let me briefly describe the benefits of this system and the ways we plan to help you cope with the changeover.

The QCS system will help us access up-to-date marketing and product information when we need it. This system will speed processing dramatically and give us access to all relevant company-wide databases. Because we anticipate that our workload will increase another 30 percent in the next several months, we need to get the QCS system online and working smoothly as soon as possible.

The changeover to this system, unfortunately, will cause some disruption at first. We will need to transfer many of our legacy programs and software applications to the new system. In addition, all of us will need to learn to navigate in the R4 and QCS environments. Once we have made these adjustments, however, I believe we will welcome the changes.

To help everyone cope with the changeover, we will offer training sessions that will begin next week. I have attached a sign-up form with specific class times. We will also provide a technical support hotline at extension 4040, which will be available during business hours; e-mail support at qcs-support@conco.com; and online help documentation.

I would like to urge you to help us make a smooth transition to the QCS system. Please e-mail me with your suggestions or questions about the impact of the changeover on your department. I look forward to working with you to make this system a success.

Enclosure: Training Session Schedule

FIGURE 1-3. Persuasive Memo

point of view

Point of view is the writer's relation to the information presented, as reflected in the use of grammatical person (Tab 11). The writer usually expresses point of view in first-, second-, or third-person personal pronouns (Tab 11). Use of first person indicates that the writer is a participant or an observer. Use of second or third person indicates that the writer is giving directions, instructions, or advice, or writing about other people or something impersonal.

FIRST PERSON	*I* scrolled down to find the settings option.
SECOND PERSON	*You* need to scroll down to find the settings option.
	Scroll down to find the settings option. [*You* is understood in such an instruction.]
THIRD PERSON	*He* scrolled down to find the settings option.

Consider the following sentence, revised from an impersonal to a more personal point of view. Although the meaning of the sentence does not change, the revision indicates that people are involved in the communication.

I regret *we cannot accept*
- ~~It is regrettable~~ that the equipment shipped on Friday. ~~is unacceptable.~~

Many people think they should avoid the pronoun *I* in business writing. Such practice, however, often leads to awkward sentences, with people referring to themselves in the third person as *one* or as *the writer* instead of as *I*.

I believe
- ~~The writer believes~~ that this project will be completed by July.

However, do not use the personal point of view when an impersonal point of view would be more appropriate or more effective because you need to emphasize the subject matter over the writer or the reader. In the following example, it does not help to personalize the situation; in fact, the impersonal version may be more tactful.

PERSONAL	I received objections to my proposal from several of your managers.
IMPERSONAL	Several managers have raised objections to the proposal.

Whether you adopt a personal or an impersonal point of view depends on the purpose and the audience of the document. For example, in an

informal e-mail to an associate, you would most likely adopt a personal point of view. However, in a report to a large group, you would probably emphasize the subject by using an impersonal point of view.

ETHICS NOTE In company correspondence (Tab 6), use of the pronoun *we* may be interpreted as reflecting company policy, whereas *I* clearly reflects personal opinion. Which pronoun to use should be decided according to whether you are speaking for yourself (*I*) or for the company (*we*).

- *I* understand your frustration with the price increase, but *we* must now add the import tax to the sales price. ✦

ESL TIPS FOR STATING AN OPINION

In some cultures, stating an opinion in writing is considered impolite or unnecessary, but in the United States, readers expect to see a writer's opinion stated clearly and explicitly. The opinion should be followed by specific examples to help the reader understand the writer's point of view.

preparation

The preparation stage of the writing process is essential. By determining the audience's needs, your purpose, the context, and the scope of coverage, you understand the information you will need to gather during research (Tab 2). See also collaborative writing and "Five Steps to Successful Writing" (page xxiii).

Writer's Checklist: Preparing to Write

- ☑ Determine who your readers are and learn certain key facts about them—their knowledge, attitudes, and needs relative to your subject.
- ☑ Determine the document's primary purpose: What exactly do you want your readers to know, to believe, or to be able to do when they have finished reading your document?
- ☑ Consider the context of your message and how it should affect your writing.
- ☑ Establish the scope of your document—the type and amount of detail you must include—not only by understanding your readers' needs and purpose but also by considering any external constraints, such as word limits for trade journal articles or the space limitations of Web pages.

Writer's Checklist: Preparing to Write (continued)

- ☑ Select the medium appropriate to your readers and purpose. See also selecting the medium.

process explanation

A process explanation may describe the steps in a process, an operation, or a procedure, such as the steps necessary to start a small business. The introduction often presents a brief overview of the process or lets readers know why it is important for them to become familiar with the process you are explaining. Be sure to define terms that readers might not understand and provide visuals (Tab 5) to clarify the process. See also defining terms.

In describing a process, use transitional words and phrases to create unity within paragraphs, and select headings to mark the transition (Tab 9) from one step to the next. Notice in the following example how obtaining a company tuition refund is described as a step-by-step process.

Tuition Refund Process

1. PROCEDURES
   - 1.1 Degree Approval
     - 1.1.1 An employee who meets school requirements and is interested in receiving tuition refunds should gain the approval of his or her manager and submit the request to the Human Resources Department. Human Resources may ask the manager to justify, in writing, the benefits of approving the degree request if the reason is not obvious.
     - 1.1.2 After agreement has been reached, the employee should complete Sections I and II of Form F-6970. After Human Resources has obtained two levels of management approval—from the employee's supervisor and the head of the department—it approves the employee's enrollment in the degree program.
     - 1.1.3 The employee who has been granted approval must submit proof of course enrollment and payment of course fees to Human Resources for tuition reimbursement.

promotional writing

Promotional writing is vital to the success of any company or organization; high-quality, state-of-the-art products or services are of little value if customers and clients do not know they exist. The specific types of promotional writing discussed in this book include writing for the Web, brochures (Tab 3), newsletters (Tab 3), proposals (Tab 3), and sales letters (Tab 6). See also Web design (Tab 5).

Although you may not be a marketing or public relations specialist, you may be asked to prepare promotional (or marketing) materials, especially if you work for a small organization or are self-employed. Even at a large company, you may help prepare a brochure, Web page, or department newsletter. See also collaborative writing.

Several elements are central to promotional writing:

- *Understanding your* audience. Analyzing the needs, interests, concerns, and makeup of your audience is crucial.
- *Understanding the principles of* persuasion. Good promotional writing must gain attention, build interest, reduce resistance, and motivate readers to act.
- *Making information both easy to find and visually appealing.* You need to make the most effective use of organization as well as layout and design. You need to select the most appropriate visuals and integrate them with the text. See also Tab 5, "Design and Visuals."
- *Writing with clarity, coherence, and conciseness.* No matter how attractive the design, if readers do not understand the message, you will not achieve your purpose. To make information accessible, of course, you must thoroughly understand the product or service you are promoting—to do so may require research (Tab 2). See also Tab 9, "Style and Clarity."

ETHICS NOTE Because readers are persuaded only if they believe the source is credible, you need to be careful to not overstate claims and to avoid possible logic errors (Tab 9). See also ethics in writing. ✦

Keep in mind that many other documents described in this book often include the additional or secondary purpose of promoting an organization. For example, adjustments (Tab 6), which are usually concerned with resolving a specific problem, offer opportunities to promote your organization. Likewise, progress and activity reports (Tab 3) provide an opportunity to promote the value of your work in an organization.

proofreading

Proofreading is essential whether you are writing a brief e-mail or a résumé. Grammar checkers and spell checkers are important aids to proofreading but can make writers overconfident. If a typographical error results in a legitimate English word (for example, *coarse* instead of *course*), the spell checker will not flag the misspelling. You may find some of the tactics discussed in revision useful when proofreading; in fact, you may find passages during proofreading that will require further revision.

Whether the material you proofread is your own writing or that of someone else, consider proofreading in several stages. Although you need to tailor the stages to the specific document and to your own problem areas, the following *Writer's Checklist* should provide a useful starting point for proofreading. Consider using standard proofreaders' marks (shown on the facing inside back cover) for marking your own or someone else's document.

Writer's Checklist: Proofreading in Stages

FIRST-STAGE REVIEW

- ☑ Appropriate format, as for reports or correspondence
- ☑ Consistent style, including headings, terminology, spacing, fonts
- ☑ Correct numbering of figures and tables

SECOND-STAGE REVIEW

- ☑ Specific grammar and usage problems
- ☑ Appropriate punctuation
- ☑ Correct abbreviations and capitalization
- ☑ Correct spelling (especially names and places)
- ☑ Complete Web or e-mail addresses
- ☑ Accurate data in tables and lists
- ☑ Cut-and-paste errors; for example, a result of moved or deleted text and numbers

FINAL-STAGE REVIEW

- ☑ Survey of your overall goals: audience needs and purpose
- ☑ Appearance of the document (see layout and design, Tab 5)

Writer's Checklist: Proofreading in Stages (continued)

☑ Review by a trusted colleague, especially for crucial documents (see collaborative writing)

See also Tab 11, "Grammar," and Tab 12, "Punctuation and Mechanics."

DIGITAL TIP PROOFREADING FOR FORMAT CONSISTENCY

Viewing whole pages on-screen is an effective way to check formatting, spacing, and typographical consistency, as well as the general appearance of documents. For comparing layouts, view multiple pages or "tile" separate documents side by side. For instructions, see <**bcs.bedfordstmartins.com/alredbwc**> and select *Digital Tips*, "Proofreading."

purpose

What do you want your readers to know, to believe, or to do when they have read your document? When you answer that question about your audience, you have determined the primary purpose, or objective, of your document. Be careful not to state a purpose too broadly. A purpose such as "to explain continuing education standards" is too general to be helpful to you as you write. In contrast, "to describe to Critical Care Nurse Society (CCNS) members how to determine if a continuing education course meets CCNS professional standards" is a specific purpose that will help you focus on what you need your document to accomplish. Often the context will help you focus your purpose.

The writer's primary purpose is often more complex than simply "to explain" something, as shown in the previous paragraph. To fully understand this complexity, you need to ask yourself not only *why* you are writing the document but also *what* you want to influence your reader to believe or to do after reading it. Suppose a writer for a newsletter has been assigned to write an article about cardiopulmonary resuscitation (CPR). In answer to the question *what?* the writer could state the purpose as "to emphasize the importance of CPR." To the question *why?* the writer might respond, "to encourage employees to sign up for evening CPR classes." Putting the answers to the two questions together, the writer's purpose might be stated as, "To write a document that will emphasize the importance of CPR and encourage employees to sign up for evening CPR classes." Note that the primary purpose of the

document on CPR was to persuade the readers of the importance of CPR, and the secondary goal was to motivate them to register for a class. Secondary goals often involve such abstract notions as to motivate, to persuade, to reassure, or to inspire your reader. See also persuasion.

If you answer the questions *what?* and *why?* and put the answers into writing as a stated purpose that includes both primary and secondary goals, you will simplify your writing task and more likely achieve your purpose. For a collaborative writing project, it is especially important to collectively write a statement of your purpose to ensure that the document achieves its goals. Do not lose sight of that purpose as you become engrossed in the other steps of the writing process. See also "Five Steps to Successful Writing" (page xxiii).

readers

The first rule of effective writing is to *help your readers*. If you overlook this commitment, your writing will not achieve its purpose, either for you or for your business or organization. For meeting the needs of both individual and multiple readers, see audience.

revision

When you revise your draft, read and evaluate it primarily from the point of view of your audience. In fact, revising requires a different frame of mind than writing a draft. To achieve that frame of mind, experienced writers have developed the following tactics:

- Allow a "cooling period" between writing the draft and revision in order to evaluate the draft objectively.
- Print out your draft and mark up the paper copy; it is often difficult to revise on-screen.
- Read your draft aloud—often, hearing the text will enable you to spot problem areas that need improvement.
- Revise in passes by reading through your draft several times, each time searching for and correcting a different set of problems.

When you can no longer spot improvements, you may wish to give the draft to a colleague for review—especially for projects that are crucial for you or your organization as well as for collaborative projects, as described in collaborative writing.

Writer's Checklist: Revising Your Draft

- ☑ *Completeness.* Does the document achieve its primary purpose? Will it fulfill the readers' needs? Your writing should give readers exactly what they need but not overwhelm them.
- ☑ *Appropriate introduction and conclusion.* Check to see that your introduction frames the rest of the document and your conclusion ties the main ideas together. Both should account for revisions to the content of the document.
- ☑ *Accuracy.* Look for any inaccuracies that may have crept into your draft.
- ☑ *Unity and coherence.* Check to see that sentences and ideas are closely tied together (coherence, Tab 9) and contribute directly to the main idea expressed in the topic sentence of each paragraph (unity, Tab 9). Provide transitions (Tab 9) where they are missing and strengthen those that are weak.
- ☑ *Consistency.* Make sure that layout and design, visuals, and use of language are consistent. (See Tab 5, "Design and Visuals.") Do not call the same item by one term on one page and a different term on another page.
- ☑ *Conciseness.* Tighten your writing so that it says exactly what you mean. Prune unnecessary words, phrases, sentences, and even paragraphs. See conciseness (Tab 9).
- ☑ *Awkwardness.* Look for awkwardness (Tab 9) in sentence construction—especially any garbled sentences (Tab 9).
- ☑ *Ethical writing.* Check for ethics in writing and eliminate biased language (Tab 9).
- ☑ *Active voice.* Use the active voice (Tab 11) unless the passive voice is more appropriate.
- ☑ *Word choice.* Delete or replace vague words (Tab 9) and unnecessary intensifiers (Tab 9). Check for affectation (Tab 9) and unclear pronoun references (Tab 11). See also word choice (Tab 9).
- ☑ *Jargon.* If you have any doubt that all your readers will understand any jargon (Tab 9) or special terms you have used, eliminate or define them.
- ☑ *Clichés.* Replace clichés (Tab 9) with fresh figures of speech (Tab 9) or direct statements.
- ☑ *Grammar.* Check your draft for grammatical errors. Use computer grammar checkers with caution. Because they are not always accurate, treat their recommendations only as *suggestions*. See Tab 11, "Grammar."

Writer's Checklist: Revising Your Draft (continued)

- ☑ *Typographical errors.* Check your final draft for typographical errors both with your spell checker and with thorough proofreading because spell checkers do not catch all errors.
- ☑ *Wordy phrases.* Use the search-and-replace command to find and revise wordy phrases, such as *that is*, *there are*, *the fact that*, and *to be*, and unnecessary helping verbs (Tab 11) such as *will*.

DIGITAL TIP INCORPORATING TRACKED CHANGES

When colleagues review your document, they can track changes and insert comments within the document itself. Tracking and commenting vary with types and versions of word-processing programs, but in most programs you can view the tracked changes on a single draft or review the multiple drafts of your reviewers' versions. For more on this topic, see <**bcs.bedfordstmartins.com/alredbwc**> and select *Digital Tips*, "Tracked Changes."

scope

Scope is the depth and breadth of detail you include in a document as defined by your audience's needs, your purpose, and the context. For example, if you write a trip report about a routine visit to a company facility, your readers may need to know only the basic details and any unusual findings. However, if you prepare a trip report about a visit to a division that has experienced problems and your purpose is to suggest ways to solve those problems, your report will contain many more details, observations, and even recommendations.

You should determine the scope of a document during the preparation stage of the writing process, even though you may refine it later. Defining your scope will expedite your research (Tab 2) and can help determine team members' responsibilities in collaborative writing.

Your scope will also be affected by the type of document you are writing as well as the medium you select for your message. For example, government agencies often prescribe the general content and length for proposals, and some organizations set limits for the length of memos and e-mails. See selecting the medium and "Five Steps to Successful Writing" (page xxiii).

selecting the medium

With so many media and forms of communication available, selecting the most appropriate can be challenging. Which electronic or paper medium is best, for example, depends on a wide range of factors related to your audience, your purpose, and the context of the communication. Those factors include the following:

- the audience's preferences and expectations
- an individual's personal work style
- how widely information needs to be distributed
- what kind of record you need to keep
- the urgency of the communication
- the sensitivity or confidentiality required
- the technological resources available
- the organizational practices or regulations

As this partial list suggests, choosing the best medium may involve personal considerations, such as your own strengths as a communicator. If you need to collaborate with someone to solve a problem, for example, you may find e-mail exchanges less effective than a phone call or a face-to-face meeting. Other considerations may depend more on the purpose or context of the communication. If you need precise wording or a record of a complex or sensitive message, for example, using a written medium is often essential.

The following descriptions of typical media and forms of communication and their functions will help you select the most appropriate for your needs.

Letters

Business letters with handwritten signatures are often the most appropriate choice for formal communications with professional associates or customers outside an organization. (See correspondence, Tab 6, and letters, Tab 6.) Letters are often used for job applications, for recommendations, and in other official and social contexts. Letters printed on organizational letterhead stationery communicate formality, respect, and authority.

Memos

Memos are appropriate for internal communication among members of the same organization; they use a standard header and are sent on paper or as attachments to e-mails. Many organizations use e-mail rather than memos for routine internal communications; however, organizations may use memos printed on organizational stationery when they need to

communicate with the formality and authority of business letters. Memos may also be used in manufacturing or service industries, for example, where employees do not have easy access to e-mail. In such cases, memos can be used to instruct employees, announce policies, report results, disseminate information, and delegate responsibilities. See memos (Tab 6).

E-mail

E-mail (or *email*) functions in the workplace as a primary medium to communicate and share electronic files with colleagues, clients, and customers. Although e-mail messages may function as informal notes, they should follow the writing strategy and style described in correspondence (Tab 6). Because recipients can easily forward e-mail messages and attachments to others and e-mail messages are subject to legal disclosure, e-mail requires writers to review their messages carefully before clicking the send button. See e-mail (Tab 6).

Instant Messages

Instant messaging (IM) on a computer or cell phone may be an efficient way to communicate in real time with coworkers, suppliers, and customers—especially those at sites without access to e-mail. Instant messaging often uses online slang and such shortened spellings as "u" for *you*, for example, to save screen space on a cell phone. Instant messaging is obviously limited because recipients must be ready and willing to participate in an online conversation. See instant messaging (Tab 6).

Telephone Calls

Telephone calls are best used for exchanges that require substantial interaction and the ability of participants to interpret each other's tone of voice. They are useful for discussing sensitive issues and resolving misunderstandings, although they do not provide the visual cues possible during face-to-face meetings. Cell (or *mobile*) phones are useful for communicating away from an office, but users should follow appropriate etiquette and organizational policies, such as speaking in an appropriate tone and switching to the vibrate mode during meetings.*

A teleconference, or conference call among three or more participants, may be a less expensive alternative to face-to-face meetings requiring travel. Such conference calls work best when the person coordinating the call works from an agenda shared by all the participants and directs the discussion as if chairing a meeting. Participants can use the Web during conference calls to share and view common documents.

*Based on the LetsTalk.com 2006 cell phone etiquette survey and resulting guidelines at <www.letstalk.com/promo/unclecell/unclecell2.htm>.

Conference calls in which decisions have been reached should be followed with written confirmation.

Voice-mail messages should be clear and brief ("I got your package, so you don't need to call the distributor"). If the message is complicated or contains numerous details, use another medium, such as e-mail. If you want to discuss a subject at length, let the recipient know the subject so that he or she can prepare a response before returning your call. When you leave a message, give your name and contact information as well as the date and time of the call (if you are unsure whether the message will be time-stamped).

Faxes

A fax is most useful when the information—a drawing or signed contract, for example—must be viewed in its original form. Faxes are also useful when the recipient either does not have e-mail or prefers faxed documents. Fax machines in offices can be located in shared areas, so call the intended recipient before you send confidential or sensitive messages.

Face-to-Face Meetings

In-person meetings are most appropriate for initial or early contacts with associates and clients with whom you intend to develop an important, long-term relationship or need to establish rapport. Meetings may also be best for brainstorming, negotiating, interviewing someone on a complex topic, solving a technical problem, or handling a controversial issue. For advice on how to record discussions and decisions, see both meetings (Tab 8) and minutes of meetings (Tab 8).

Videoconferences

Videoconferences are particularly useful for meetings when travel is impractical. Unlike telephone conference calls, videoconferences have the advantage of allowing participants to see as well as to hear one another. Videoconferences work best with participants who are at ease in front of the camera and when the facilities offer good production quality.

Web Sites

A public Internet or company intranet Web site is ideal for posting announcements or policies as well as for making available or exchanging documents and files with others. Your Web site can serve not only as a home base for resources but also as a place where ideas can be developed through, for example, discussion boards, blogs,* and wikis. See also collaborative writing, writing for the Web, Web design (Tab 5), and "Wikis for Collaborative Documents" (page 4).

*A *blog* (short for "Weblog") functions like a journal or diary and often includes commentary, discussion, or news on a particular subject.

writing a draft

You are well prepared to write a rough draft when you have established your purpose and audience's needs, considered the context, defined your scope, completed adequate research (Tab 2), and prepared an outline (whether rough or developed). (See also outlining.) Writing a draft is simply transcribing and expanding the notes from your outline into paragraphs, without worrying about grammar, refinements of language, or spelling. Refinement will come with revision and proofreading. See also "Five Steps to Successful Writing" (page xxiii).

Writing and revising are different activities. Do not let worrying about a good opening slow you down. Instead, concentrate on getting your ideas on paper—now is not the time to polish or revise. Do not wait for inspiration—treat writing a draft as you would any other on-the-job task.

Writer's Checklist: Writing a Rough Draft

- ☑ Set up your writing area with whatever supplies you need (notepads, pens and pencils, reference material, and so on) to keep going once you get started—and avoid distractions.
- ☑ Resist the temptation of writing first drafts on the computer without any planning by using a good outline as a springboard to start and keep going.
- ☑ Keep in mind your readers' needs, expectations, and knowledge of the subject. Doing so will help you write directly to your readers and suggest which ideas need further development.
- ☑ When you are trying to write quickly and you come to something difficult to explain, try to relate the new concept to something with which the readers are already familiar, as discussed in figures of speech (Tab 9).
- ☑ Start with the section that seems easiest. Your readers will neither know nor care that the middle section of the document was the first section you wrote.
- ☑ Give yourself a set time (ten or fifteen minutes, for example) in which you write continuously, regardless of how good or bad your writing seems to be. Don't stop when you are rolling along easily—if you stop and come back, you may lose momentum.
- ☑ Routinely save to your hard drive and create a backup copy of your documents on separate disks or on the company network.

Writer's Checklist: Writing a Rough Draft (continued)

- ☑ Give yourself a small reward—a short walk, a soft drink, a brief chat with a friend, an easy task—after you have finished a section.
- ☑ Reread what you have written when you return to your writing. Seeing what you have already written can return you to a productive frame of mind.

writing for the Web

In the workplace, those who write content for Web sites are not always the same people who design the sites. This entry provides guidelines only for those writing for an online audience; for more information on site design, see Web design (Tab 5).

ETHICS NOTE For questions about the appropriateness of content you plan to post on the Web, check with your webmaster or manager to determine if your content complies with your organization's Web policy. On campus, consult your instructor or campus computer support staff about standards for posting Web content. See ethics in writing. ✦

Crafting Content for Web Pages

Because most readers scan Web pages for specific information, the way you write and organize your information will greatly affect your readers' understanding. State your important points first, before any detailed supporting information. (This method is called *inverted pyramid organization.*) Keep your writing style simple and straightforward, and avoid such directional cues as "as shown in the example below" that make sense on the printed page but not on a Web screen. Use the following techniques to make your content more accessible to readers.

Headings. Break up dense blocks of text with short paragraphs that stand out and can be quickly scanned and absorbed. Use informative headings (Tab 5) to help readers identify topics and decide at a glance whether to read a passage. Headings clarify text by highlighting structure and organization as they also signal transitions from one topic to the next.

Lists. Use bulleted and numbered lists (Tab 5) to break up dense paragraphs, reduce text length, and highlight important content.

Keywords. To help search engines and your audience find your site, use keywords in the first fifty or so words of your text.

WITHOUT KEYWORDS	We are proud to introduce a new commemorative coin honoring our bank's founder and president. The item will be available on this Web site after December 3, 2008, which is the hundredth anniversary of our first deposit.
WITH KEYWORDS	The new *Reynolds* commemorative coin features a portrait of *George G. Reynolds*, the founder and president of *Reynolds Bank*. The coin can be purchased after December 3, 2008, in honor of the hundredth anniversary of the sale of the first *Reynolds* deposit.

Graphics. Graphics provide visual relief from text and make your site attractive and appealing. Use only visuals (Tab 5) that are appropriate for your audience and purpose, however, and use graphics that load quickly.

Hyperlinks. Use internal hyperlinks to help readers navigate the information on your site. If a passage of text is longer than two or three screens, create a table of contents of hyperlinks for it at the top of the Web page and link each item to the relevant content further down the page. Use external hyperlinks to enrich coverage of your topic with information outside your site and to help reduce content on your page. When you do, consider placing an icon or a text label next to them to inform users that they are leaving the host site. In general, avoid too many hyperlinks within text paragraphs because they can distract readers, make scanning the text difficult, and tempt readers to leave your site before reaching the end of your page.

Fonts. Font sizes and styles affect screen legibility. Because computer screens display fonts at lower resolutions than does printed text, sans serif fonts work better for online text passages. Consult your webmaster (or manager) about your site's font preferences. Do not use capital letters or boldface type for blocks of text because they slow the reader. For content that contains special characters (such as for mathematical or chemical content), consult your webmaster about the best way to submit the files for HTML (hypertext markup language) coding or post them as PDF (portable document format) files.

Line Length. Line length also affects readability because short line lengths reduce the amount of eye movement necessary to scan text. Optimal length is approximately half the width of the screen. To achieve this length, draft text that is between 50 and 70 characters (or between 10 and 12 words) to a line.

Writing for a Global Audience

When you write for public-access sites, eliminate expressions and references that make sense only to someone very familiar with American English. Express dates, clock times, and measurements consistent with international practices. For visuals, choose symbols and icons, colors, representations of human beings, and captions that can be easily understood, as described in global communication and global graphics (Tab 5). See also biased language (Tab 9) and English as a second language (Tab 11).

Linking to Reputable Sites

Links to outside sites can expand your content. However, review such sites carefully before linking to them. Is the site's author or sponsoring organization reputable? Is its content accurate, current, and unbiased? Does the site date-stamp its content with notices such as "This page was last updated on January 1, 2008"? (For more advice on evaluating Web sites, see research, Tab 2.) Link directly to the page or specific area of an outside site that is relevant to your users and be sure that you provide a clear context for why you are sending your readers there.

Posting an Existing Document

If you post files for existing paper documents to a Web site, try to retain the document's original sequence and page layout. If you shorten or revise the original document for posting to the Web, add a notice informing readers that it differs from the printed original.

Regardless of format or version used, be sure to do the following:

- Obtain permission from the copyright holder for the use of copyrighted text, tables, or images. See also copyright (Tab 2) and plagiarism (Tab 2).
- Ask the webmaster or site administrator about the preferred file format to submit for coding and posting. On campus, consult your instructor or campus computer support staff.
- Request that the webmaster optimize any slow-loading graphics files for quick access.
- Review the document internally before it is posted to the public site: Is it the correct version? Is any information missing? Do all links work and go to the right places? See proofreading.
- Ask the webmaster to create a single-file version of the document (a version formatted as a single, long Web page) for readers who will print it to read offline.

ETHICS NOTE Document sources of information — text, images, streaming video, and other multimedia material — or of help received.

Seek prior approval before using any copyrighted information. Documenting your sources is not only required, but it also bolsters the credibility of your site. To do so, either provide links to your source or use a citation as described in documenting sources (Tab 2). ✦

Protecting the Privacy of Users

Put a link on your page to the site's privacy statement, particularly if you solicit comments about your content or have an e-mail link for unsolicited comments for site users. A Privacy Statement informs site visitors about how the site sponsor handles solicited and unsolicited information from individuals, its policy on the use of cookies,* and legal action it takes against hackers. Inform users if you intend to use their information for marketing or to share their information with third parties, and give visitors the option of refusing you permission to use or share their information.

DIGITAL TIP USING PDF FILES

Converting documents such as reports, articles, and brochures to PDF files allows you to retain the identical look of the printed documents. The PDF pages will display on screen exactly as they appear on the printed page. Readers can read the document online, download and save it, or print it in whole or in part. For more on this topic, see <**bcs.bedfordstmartins.com/alredbwc**> and select *Digital Tips*, "Using PDF Files."

*"Cookies" are small files that are downloaded to your computer when you browse certain Web pages. Cookies hold information, such as your user name and password, so you do not need to reenter it each time you visit the site.