A Rhetorical Approach to Workplace Writing

3rd Edition

Prepared by the Professional & Technical Communication Program in the Department of English at the University of South Florida.

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Audience Analysis: Primary, Secondary, and Hidden Audiences
Diplomacy and Tone Checklist
Diplomacy, Tone, and Emphasis in Business Writing
Kairos
Practicing Intercultural Communication
Researching Your Audience

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About This Text

A Rhetorical Approach to Workplace Writing, as the title indicates, approaches professional and technical communication from a rhetorical perspective. As teachers of professional and technical communication ourselves, we understand the importance of teaching students communication skills that are transferable to the workplace. Rather than focusing on traditional genre analysis, this textbook takes the more practical approach of analyzing real-world workplace scenarios. In an effort to accomplish the goal of providing our students with a set of communication skills and practices that can be adapted to a wide-variety of professional contexts, this textbook focuses on the importance of reading and interpreting the rhetorical situation during any communicative act, and guides students through the process of creating and designing documents from a user-centered perspective.

A Rhetorical Approach to Workplace Writing is specifically designed to serve the following courses at the University of South Florida:

- ENC2210 Technical Writing for Health Sciences Majors
- ENC3246 Communications for Engineers
- ENC3250 Professional Writing

The chapters have been designed to complement the curricula of these specific courses, while also being broad enough in scope to accommodate any course in technical or professional writing. Chapters are organized under two major categories, concepts and applications. Concepts introduce students to rhetorical, inquiry-based approaches to professional and technical writing. Applications look at how these concepts can be applied in specific writing situations.

Preface to the Third Edition

It is difficult to imagine the circumstances under which someone would voluntarily read the preface to a textbook, so I will assume that you have either been assigned this chapter by your writing instructor, or (more likely) that you are stranded alone on a deserted island with only this book for companionship. In any event, I will be brief.

If you are stranded alone on a deserted island, though, you will find little of use in the following pages. This book deals primarily with the kinds of questions you can ask when writing professional and technical documents in the workplace. There is no information here about building a fire, constructing a rudimentary shelter to protect yourself from the elements, or fishing. Had I known your specific needs, perhaps some of that vital information could have been included.

And maybe that's the point of this book. The more you know about who your readers are, where they are, and what they need, the better able you will be to write for them.

A simple chart explaining which berries are poisonous and which are not, for example, would probably mean the world to you right now.

Concepts

Workplace Writing and the Rhetorical Situation

There are two kinds of writers in the workplace: writing professionals and professionals who write. Writing professionals are people whose jobs and careers are all about writing: technical communicators, grant writers, social media specialists, and so forth. Professionals who write are people who have a job—engineer, administrator, health care specialist—and have to write in order to get their real work accomplished. Writing professionals usually choose their careers because they like to write and have had the benefit of spending a lot of their time in college learning how to write in professional and technical settings. Professionals who write? They just get thrown into the deep end—and either learn to swim or sink.

But professionals who write can use the same strategies that writing professionals use to write well on the job. Consider the case of Darlene. Darlene was one of several new employees in the accounting department of a large government agency whose workplace writing practices were studied by Dr. Susan Katz. Darlene was hired because she had a degree in accounting and work experience as a bookkeeper. She claimed never to have taken a specialized writing class or even focused on writing all that much.

Darlene made quick progress through her organization, achieving promotions ahead of schedule. And while she always received outstanding evaluations for her work, what her co-workers and supervisors mentioned when they talked about Darlene was her expertise as a writer. One of her bosses observed that the first time he read something written by Darlene, he thought he had "died and gone to heaven." He said, "She puts everyone else in the Bureau to shame."

Darlene said she thought that she just had a natural gift for writing well and that she had written well all her life. Dr. Katz's research, however, showed that Darlene employed some specific strategies that made her writing more effective:

Before she started writing, Darlene thought about

- her audiences,
- the purposes that the document would serve, and
- the goals of her organization.

While she was writing, Darlene

- asked questions about organizational conventions that seemed confusing or inconsistent,
- made conscious choices about diction and style, and
- used persuasive strategies to convince others to accept her ideas.

Darlene may very well have had a natural talent for writing, but, as it turns out, she was also a master rhetorician. And that's good news for people who don't think they have a "talent" for writing. If you buy into the idea of "natural talent" (and few writing instructors do), either you have talent or you don't. But rhetoric? Rhetoric is a craft. It's something anybody can use, if they just know how.

Rhetoric is the set of methods you use to communicate with other people, to persuade them, or to identify with them and encourage them to understand things from your point of view. What Darlene was doing—before she sat down to write anything—was thinking about her rhetorical situation and then analyzing her writing situation. You'll learn about the rhetorical situation in this chapter. Later, you'll learn strategies for analyzing your writing situation.

What is the "Rhetorical Situation"?

Like Darlene, you're probably already pretty good at analyzing your rhetorical situation in day-to-day situations, even if you've never thought about or heard the term rhetorical situation.

The term "rhetorical situation" refers to any set of circumstances in which at least one person uses some form of communication to modify the perspective, decision-making or actions of at least one other person. In a video he made for YouTube, Florida State University student Morgan Shepard compares the rhetorical situation to a football game. After all, a football game is an ongoing dialogue between two opposing teams. From the perspective of the home team, which is behind on the scoreboard, the quarterback needs to connect with a wide receiver so the wide receiver can score a touchdown and change the course of the game. Meanwhile, the opposing team's defense tries to limit the quarterback's options for action. That scenario captures the essential elements of any rhetorical situation: a situation with a sense of urgency, someone in a position to react to the situation, and an assortment of obstacles and limitations.

- **The Physical Therapy Office**: Imagine that a well-educated patient enters an occupational therapy office with ten peer-reviewed scientific articles about his condition that he downloaded from the Internet. The therapist has not read these specific articles, but she is confident in her training, experience, and overall expertise in treating the patient's condition. When she begins to prescribe therapeutic treatments, the patient becomes agitated and keeps holding up the print-outs, countering her recommendations with quotes from the article. The patient has created a rhetorical situation for the therapist that involves considering the patient's mood, personality, and priorities as well as managing time limitations of the appointment, office policies and protocol, and even interpreting conditions like gender bias and the pervasiveness of electronic journals before responding.

- **The Engineering Firm**: A Florida community with a port on the Gulf Coast caters to many mid-sized cruise ships. Local businesses like taxi drivers and hotel owners rely on this industry. In recent years, cruise ship technologies have allowed engineers to build larger ships with higher capacities that are able to offer lower prices and more entertainment options. Unfortunately for stakeholders in the port, an area bridge is too low for these newer larger ships to pass under. The three main options raised in media reports are 1) rebuilding the bridge (a task more expensive and complicated than just raising it because of the bridge's architecture and the size of the port); 2) moving the cruise port to a different location; 3) hoping that the market for smaller cruise ships doesn't die completely. The Port Authority has contracted out an engineering firm to run a feasibility study. The main audience for this document will be the Port Authority director, but local businesspersons, media reporters, and residents will also read the report. The engineers writing the report must consider a number of factors like the genre, time limits, and budget of the study before beginning.

Elements of the Rhetorical Situation

Every rhetorical situation includes three components:

1. **An occasion**: The "need," usually a problem, issue, or circumstance, that motivates this particular communicative act in this particular time in this particular place. The occasion has both a sense of urgency and the possibility that a rhetor (speaker, writer, composer, designer) can make a change to the situation by using communication to shape the opinions, decision-making, or actions of an audience. An occasion is only rhetorical if it can be changed by humans interacting through language.
2. **An audience**: The intended and incidental recipients of the text, who can be influenced by or react to the communicative act.
3. **The constraints**: A set of factors that limit options for communicating, which include a.) constraints the rhetor brings to the situation, and b.) con-

straints associated with the situation itself.

Usually, a problem, issue, or need arises or is identified. The issue, which we call the “occasion,” suggests an audience (or audiences), and is embedded within particular personal, social, material, economic, and cultural conditions that limit, or “constrain,” your options for engaging the audience. This is the simplest way to understand the rhetorical situation.

Analyzing Writing Situations in the Workplace

Writing takes many forms in the workplace. Whether you are scribbling a note, texting, emailing, designing slides, creating an infographic, making a video, updating your teammates on work to be done at the end of a meeting, or writing a formal report for your boss, you are writing—and all writing occurs within a writing situation.

A writing situation, like the rhetorical situation, is a way to understand the context you're writing for. To figure out your writing situation you can ask yourself the following questions:

- What circumstance, event, or occasion motivates this communication?
- Are you familiar with the audience(s)?
- Are you aware of any constraints that will limit what you can say in this communication?

Table 1. Elements of the Writing Situation

Occasion	The "need"
Audience(s)	Intended and incidental readers, listeners, or users
Constraints	Limitations - the ones the writer(s) bring to the situation and the ones the situation places on the writer(s)

Purpose(s)	The writer(s) and/or organization's desired outcomes
Writer	The position the writer takes within the text (sometimes called "ethos") in relationship to the audience and purpose
Text	The item(s) you will produce for this audience to achieve your purpose(s) on this occasion

Whether you're working on an individual assignment or planning a big project with a team of collaborators, you can use the questions in this chapter to help you think about ways to approach the job. The questions here are just starting points. You may think of other questions that are relevant to the task at hand. You may not need, or be able, to answer every question below in every case.

Occasion

Occasion consists of the specific circumstances that lead you to create a text. The "need" is the problem, issue or circumstance that motivates this particular communicative act in this particular time in this particular place.

Consider asking these questions:

1. What issue, problem, or need prompts you to write or act at this particular time in this particular place?
2. Why is this important now?
3. What is at stake?

Audience

If you can ask only one question about audience, consider asking, “What information do my readers need in order to understand my message?” Your reader is the single largest shaper of the texts you will produce. Your understanding of your readers helps you make decisions about what content to include, what tone and level of formality is appropriate, what specialized language to include, what terms to define, what level of technical detail is appropriate, which organization is most effective, and what delivery medium and format are most appropriate. Many documents will have more than one audience.

Answer the questions below for your primary readers and secondary readers. Consider carefully which questions might be relevant in the event you have hidden readers:

1. Who are the primary and secondary readers?
    b. Are you writing for an individual or a group?
    c. Do you know your readers personally? What is your organizational relationship to him/her/them? Are you a superior? subordinate? peer? insider? Outsider?
2. What type of reader is this?
    c. Experts may be concerned with increasing their own knowledge or evaluating validity (of documents, projects, proposals)
    d. Managers may be concerned with decision-making or getting up-to-speed
    e. Technicians may be concerned with the nuts-and-bolts
    f. Lay people may lack familiarity with the subject matter

3. How much knowledge or technical expertise does the reader possess on this particular subject?
    d. Experts/peers require less explanation
    e. Novices or lay people require more explanation
    f. Highly technical readers benefit from specialized language or jargon
    g. Low technicality readers may be confused by specialized language or jargon
4. What biases or preconceptions does the reader bring to this text?
    e. How will those biases influence the reader's reception of the text?
    f. Are they likely to be resistant to the content of the text?
    g. Will they be more likely to agree/or disagree with the information in this text?
5. What cultural considerations might you need to address to accommodate the primary audience?
    f. Do you need to adjust the content to accommodate a global audience?
    g. Do you need to adjust language or structure of the document in order to meet the needs of this audience?
    h. Does this audience live in a culture that is heavily influenced by specific traditions or religious custom that you must take into account?

Constraints

Constraints include both the limitations you bring to the project as a writer and the limitations the situation imposes on you. Constraints can be practical things like tools, budgets, company policies, but they can also be the attitudes you and your audience carry with you, relationships between people, and whole range of cultural, ethical, and political factors.

Consider asking these questions:

1. What practical or physical circumstances affect the writing, design or distribution of this project?
   b. What environment are you writing in?
   c. What tools/technology do you have available?
   d. How much time do you have?
   e. What is your budget?
2. What beliefs, attitudes, prejudices, or habits do you bring to the project and how will they affect writing or design?
3. What constraints will the reader face when they are interacting with the text?
   a. What environment will they be reading/using your document in?
   b. How will they access/receive your text, and will they need specific technologies?
   c. Will the text have their full attention or will they be distracted?
   d. Will they be limited by lack of time, space, access or resources?
   e. What existing beliefs, attitudes, prejudices, habits, events, circumstances or traditions will affect your readers' perception of the text?
4. What company or legal policies and ethical considerations affect the writing, design or distribution of this project?
5. What relationships between individuals or groups might affect the writing, design or distribution of

this project?

a. What is the organization's structural hierarchy?
b. Will you be stepping on anyone's toes by speaking over the head of someone with a higher job title or higher position in the hierarchy than yourself?
c. If the communication is intended to be private, is there a chance that it might be intercepted by an unintended audience?

Purpose

All workplace documents have multiple purposes. The most important and universal purposes are:

- Building better relationships between people, both inside and outside the workplace
- Creating positive action

There may be additional purposes or goals for your document. Common purposes include the following:

- To inform
- To instruct
- To persuade
- To describe
- To document
- To educate
- To advise
- To warn
- To create a legal or historical record
- To get the audience to feel an emotion
- To get the audience to take action
- To get the audience to change an opinion

Here are some questions to ask about purpose:

- From the perspective of the organization (i.e. your department, company, etc), what is the main purpose of the document? Are there secondary purposes? Other purposes?
- From *your* perspective, what is the main purpose of the document? Secondary purpose? Other purposes?
- What is the reader's goal or objective for this text?
- How will the reader use or interact with this text?
- What kind of information or content does the reader expect to find in this text?

Writer

As a writer of text, you may be entirely responsible for the content, or you may be part of a team of people who are all working on the same project. Regardless of whether a document is actually written by an individual or a team, you will have to make choices that will impact the way the audience thinks about the person or group who created the document. To ensure that you and/or the organization you're writing for are perceived the way you and/or they want to be, consider the following:

1. What is your and/or your organization's relationship to the purpose or subject?
2. How do you and/or your organization want to be perceived by the audience?
3. Given your audience and purpose, what tone is most appropriate for the message you wish to convey?
4. Given your audience and purpose, what lan-

guage choices are most appropriate?
    a. What degree of formality is appropriate?
    b. Will jargon and specialized language aid or hinder understanding?
    c. Do you need to adjust your message because of political or ethical considerations?
    d. Does the message have a negative or positive impact on others?
    e. Are there ethical, legal, or financial factors that might affect the way your text is received?

Text

Your understanding of audience and purpose, along with constraints on your particular situation, will influence the decisions you make about genre, medium, design, and delivery of the project.

A *genre* is a kind of text that has particular features and follows specific conventions of style and formatting. In the workplace, genres develop as a way to systematically respond to recurring writing situations. A *medium* is a means of communication. The medium might be audio, print, or electronic. *Design* is the formatting and visual style of your text. *Delivery* is the method you will use to distribute your text.

1. What genre expectations does the audience have?
    b. Does this genre dictate that specific content be included or excluded?
    c. Does this genre dictate a particular pattern of organization?
    d. Does this genre dictate particular design

features?
2. What medium is most appropriate and how does that medium affect writing or design of the text?
3. Given audience, purpose, genre and medium, what overall look is appropriate for this text?
4. What design features are required?
5. How should this text be delivered to the audience?

As you can see, understanding your writing situation is a lot to think about, but, really, it's something you do everyday when you write or speak. Every time you communicate something, you're considering who you're saying it to and how it should be said to achieve the desired purpose in a specific moment or situation. Whether you're emailing your boss for a day off or texting a friend to go to lunch, you're thinking about your writing situation. Considering the writing situation in the workplace positions your project in the larger context of the world in which it exists, and this understanding goes a long way to guaranteeing its success.

Researching Your Audience

Who are you writing for? If you know who's reading, it's much easier to imagine what you need to say and how you need to say it to make sure that the document you're creating is as clear and concise as possible. Demographics—things like gender, age, income, and race—can can help you understand your readers, but people are more than the sum of the statistics that describe them. Going beyond demographics and researching a document's target audience more deeply can help develop an understanding of the audience's needs and expectations.

So, how do you get to know your target audience? A good place to start is the Internet. The information you find might include studies conducted by other researchers, census reports and other public records, scholarly and trade journals, and official websites for professional organizations and government departments.

While you're researching, remember to check the credibility of your sources. Look into who published the source. What social, political, or professional affiliations does the publisher have? Was there a peer review or other process overseeing the accuracy of the source? Here are some tips to help you establish the credibility of a source:

- Analyze the document's design. Generally, credible sources are presented cleanly and concisely.
- Check the source's citations. A credible source often will cite other credible sources.

- Consider the way data is collected. For example, if you're looking at a survey, how many people were questioned? Five or 5,000?
- Consider the date of publication. Remember that in the fields of health, science, and business, new discoveries occur often and old data becomes dated. Also, your document serves an audience's present need, so current data probably is more useful.

You know another great thing about the Internet? People use it to talk about themselves. A lot. In addition to government, professional, and scholarly conversations about your audience, you can read what members of an audience think about their community and themselves, and maybe even the topic or issue your technical communication actually addresses. When you read these sources, try to listen for the values and the language that communicates these individuals' needs.

You also may decide to talk to your target audience directly. Here are some ways to do that:

Observation

If you get permission, you can watch your audience interact in real-life situations. For example, if you are hired by a hospital to help improve patient communication, you might get permission to watch some interactions between patients and nurses or doctors. Should you do this work, make certain you get data from multiple sources and compare those data with each other as you draw conclusions. Data collected from a single observation can't be relied upon to accurately represent a larger group.

Surveys

Surveys are particularly useful for providing statistics about demographics and answering specific questions directed towards your audience. You can ask straightforward questions about race, gender, beliefs, attitudes, but carefully consider the response options and what is implied in the language you use. You don't want to bias your participants' responses by giving them a poorly worded question, or offend them with objectionable or culturally insensitive language.

Interviews

Unlike surveys, answers in interviews are more personal and open-ended. When deciding whether and whom to interview, consider that interviews take more time than surveys. You can get more in-depth with interviews, but you'll be talking to fewer people, which means you're not necessarily getting the broadest perspective. Prepare your questions ahead of time and avoid "yes/no" questions that discourage dialogue.

Focus Groups

These are like interviews conducted with a small group of people at the same time. Create a comfortable setting to encourage participants to interact not only with you, but with each other. Participants should be free to discuss their opinions. Use a moderator to keep participants on task, mitigate any hostility between personalities, and conclude the session on time. As with observations, conduct a few focus groups to ensure that you're drawing reliable conclusions from the sessions.

Each of these methods has its merits and challenges, and the method you choose should depend on the context of your project. Often, a combination of methods is most beneficial. Whichever methods you use, remember that the more you know your audience (as opposed to knowing *about* your audience) the more effective your document will be.

Audience Awareness: Expertise, Bias, and Circulation

Your readers in the workplace expect to get information from you that they can use. To write usefully for those readers, you must be aware of their needs and expectations, which comprise a broad range of identities and attributes:

- Values and priorities
- Cultural norms
- Demographics
- Levels of expertise

It's your job is to design accessible content that is ethically and culturally sensitive, and understands the reader's level of expertise. But there's still another aspect of audience awareness you'll need to consider. Additionally, your target audience may not be the only people or group who read your document. As you know, many professional and technical documents often circulate far beyond their original context. Writing for audience awareness is a big task, but here are some things you can do to make sure your document succeeds with both its main audience, as well as with others who are likely to read it:

Analyzing Your Audience's Needs

There are some key questions to ask when determining the reader's needs and expectations:

1. Who specifically is your reader? Are there multiple readers?
2. What do your readers already know about the subject?
3. Do you need to modify your message for international readers? Are there cultural issues that you need to address or avoid?
4. How would a reader other than your target audience perceive your work? Is it likely that it could be misinterpreted?

As a writer, it's your job to determine who makes up your audience. You should continue to analyze your audience throughout the writing process. Keep in mind that you need to know the audience's level of expertise—both in general and on the specific issue or subject your document deals with—if you document is going to be useful. The following examples demonstrate how to write to different levels of expertise in different fields:

Healthcare

While it might be acceptable for a physician to refer his patient to a specialist for their exanthema, that patient is more likely to understand the term "skin rash." As a writer in the medical field, the importance of writing appropriately for your audience could be lifesaving. Additionally, it will be far less stressful on patients to not keep a medical dictionary on-hand just to decipher what ails them.

Engineering

As an engineer, you'll probably need to communicate with several different audiences—possibly all in one document. For example, if you are drafting a technical report on your latest project, the company president will be more interested in the executive summary and the financial reporting. Financial tables and projects would be key to this audience. Once the other hand, technicians and engineers will be more interested in the technical details of the project. For this audience, charts, mathematical expressions, and scientific language may be most effective. Both audiences will read the entire document, but focusing those areas to each group will allow you to communicate your purpose more efficiently and effectively.

Business

Business writing such as memos, emails, reports and business plans can have very broad audiences, while still communicating very technical information. Additionally, business professionals value efficiency, and often efficiency is viewed as a function of time. For these audiences, communicating the important information first and clearly allows readers to quickly decide if a document is important for them so they can get the details they need and respond as necessary in a timely manner.

To accommodate different levels of expertise, ask yourself the following: Are your readers knowledgeable on the topic? Do they have extensive background information and familiarity with the subject, or are they laypersons, unfamiliar with the technology or process you are writing about? The less your audience knows about the subject, the less technical your document should be, and the more likely it is that all acronyms and jargon should be clearly defined. If your audience is a group of people with diverse knowledge, or you don't know your immediate audience, you may need to make an educated guess about their needs and interests. In this case, you should err on the side of caution by clearly defining all process and terms that could be confusing. It's also important to keep in mind that documents often circulate widely, so you may not know who all your audiences will be. How do you write for audiences you may not know you have?

Primary, Secondary, and Hidden Audiences

Primary audiences are those who receive the communication directly. That person is also usually the decision maker. Secondary audiences are those readers who are not the primary addressee, but are still included as viewers. A hidden audience are all those who fall outside of the primary and secondary audiences. This could be someone who shares a common interest with either the primary or secondary audience or might simply be an indirect recipient of your document.

The hidden audience, of course, is the most challenging to accommodate in your document, but here are some tips help make your document useful to all audiences:

- Use at least some language that can be understood by hidden audiences. Even the most technical document can include some information that is accessible by general audiences.
- Avoid inside jokes or potentially upsetting humor, even if you think your document will be seen only by people you are acquainted with personally.
- Exclude biased language. Make sure that your document isn't going to be perceived as offensive to anyone who might read it.

Biased Language

Technology has made our lives easier and brought our world closer together, making it accessible to conduct business on global level. When adapting a message to your audience, be sure to use language that is sensitive to implied biases. Avoid expressions that refer to gender, race, ethnicity, age, and disability unless they are necessary for understanding the context of the situation. Avoid use of idioms and phrases, as they are can be confusing or offensive in other cultures.

Being audience aware is a big job. No matter how accurate, technically sophisticated, or life-changing the information in your document is, if your audience doesn't get it, can't access it, or is offended by it, the information won't go anywhere and the message doesn't matter. The response of the audience determines how successful the document is, so understanding your audience is just as important as understanding what you're trying to communicate.

Usability Testing

You know a bad website when you see one, right? You go to a website looking for information, but you can't find what you're looking for—or you don't want to. The links have confusing names, the pictures are too big, the text is too small, the colors are gross, the menu or sidebar doesn't scroll with you as you poke around trying to find what you want.

What do you call this problem? It's not that the information isn't somewhere on the site, and it's not that the website doesn't work. The problem is that the website isn't *usable*. The site's design and organization makes it difficult for you, the user, to accomplish your goals. And the problem is frustrating. More often than not, unless you absolutely have to use that site to get something done, you leave.

Usability is an extremely useful term that focuses our attention on users, rather than exclusively on the content or information being provided. But how do we learn to think about usability when writing technical communication? If you keep your own experiences with horrible websites in mind, it will be easier to consider your project from perspective of the people who will be interacting with your writing.

Usability in Practice

In practice, usability is a matter of both development and testing. In other words, for objects and documents to be most usable, users and their needs should be central concerns throughout the design process, from the planning stages through to public release.

In the workplace, however, this can be a difficult target to hit. Some workplaces fully implement *user-centered design*, which is a design process that brings in real-life users at the development phase. The idea is that including users during the design phase ensures that the way a project is used will be “naturally” integrated into the design rather than something users have to learn to work with or work around later.

However, user-centered design is often costly and time consuming, so many workplaces will only involve real users at the end of the project, if at all. In these circumstances, the task of advocating for users often falls to the designers and writers involved with the project. It’s then up to you to determine who the users are, their needs and expectations, and how those needs and expectations can best be met. It becomes your job to think like a user.

You can consider a variety of elements when you’re thinking about usability. The elements you consider will depend on project, who’s using the final product, and recommendations from usability experts that you find most relevant. Of course, if you’re conducting usability studies in a real workplace, you’ll also be influenced by what the programmers, managers, engineers, accountants, or other co-workers think is important.

For example, usability studies could focus on any one or more of the following elements of a designed object or system:

- Clarity
- Consistency
- Convenience
- Elegance
- Familiarity
- Functionality
- Learnability
- Predictability
- Responsivity
- Skimability
- Simplicity
- Visibility

Here are some questions you can ask to help you incorporate usability principles as you design for specific audiences:

1. Who are my users?
2. What are my users' expectations for this kind of product or service?
3. What are my users' needs and goals? Why are they using this product or service?
4. Can my users' needs and goals be prioritized? Should the product or service focus on particular needs and goals while still enabling others?
5. What prior related experiences do my users bring to this product or service?
6. What are my users' cultural contexts?
7. How accessible is this product or service to my users? Might some of my users require accommodations that other user groups may not?
8. What are the top criteria by which users will judge this product or service's usability?

If you are able to involve users in development and testing, you can bring these questions those users directly. Conduct focus groups, observe users trying to perform specific tasks, and ask for user feedback as you develop the project. Remember, your goal is to design, as well as write, with the user in mind.

Diplomacy, Tone, and Emphasis in Business Writing

Name that Tone

Consider the following lines from business emails. How would you describe the tone of each entry? What words, phrases, or other elements suggest that tone?

"Maybe if the project leader had set a reasonable schedule from the beginning, we wouldn't be in this mess now."

"Whatever they're paying you, it isn't enough. Thanks for working so hard on this."

"I'm not sure what else is on your plate right now, but I need these numbers by this afternoon—actually in the next two hours."

"i cant remember when u said this was due."

"While I appreciate that your team is being pulled in a number of different directions right now, this project is my department's main priority for the semester. What can we do from our end to set your group up to complete this by June?"

Whether in a workplace or in our personal lives, most of us have received emails that we've found off-putting, inappropriate, or, at a minimum, curt. Striking the right tone and being diplomatic, particularly in business communication, can mean the difference between offending your reader and building important professional relationships. And more immediately, it can mean the difference between getting what you want and being ignored.

As with any piece of writing, considering audience, purpose, and type of information is key to constructing business communication. Truly finessing your writing so that it works for you, rather than against you, is key to forming strong professional relationships and being effective in your own position.
The following tactics and examples outline the small revisions in your writing that can go a long way in building diplomacy and not only keeping your tone appropriate, but also using it to your advantage.

First, prior to writing, consider the following questions:

- *Who is my audience? What does the audience need to know, and what do they already know?*
- *Why does this email feel tricky or difficult in terms of getting the tone just right?*
- *Why am I writing? Am I informing my audience? Asking for help? Delivering bad news?*
- *Do I have strong feelings about the subject or situation that might get in the way of writing effectively and appropriately?*
- *Are there specific elements (anything from highlighting big problems to reminding the reader about an important due date) that I want to emphasize?*

Once you have answered these questions, consider the strategies below as you begin to compose your communication. Certain tactics will likely be more relevant than others, depending on the type of communication, but each of these tips can help you get into the habit of more diplomatic writing as you move through college and into your career.

Strategies for Getting Diplomacy, Emphasis, and Tone Right

1. **Remind your reader what's in it for them, especially when asking for help**

Rather than: *I'm bringing in a new analyst to work with you on this because the rest of the group is swamped. You'll have to take the extra time to fill her in.*

Write: *You'll have a new analyst to work with on this, and, luckily, you will be able to train her on the way you'd like things to be done.*

2. **Acknowledge the work of others as often as you can**

Rather than: *I need this by 5pm tomorrow.*

Write: *I imagine you're just as swamped as we are, but in order to move forward, we really need this by 5pm tomorrow.*

3. **Ask (when you can afford to hear no) and thank your reader**

Rather than: *You need to stay until the meeting ends, which will likely be around 7:00 p.m.*

Write: *Would it be possible for you to stick around until this meeting ends, which will likely be around 7:00 p.m.? I'd really appreciate it.*

4. Avoid passive aggressiveness at all times

Rather than: *It seems that reading the document I sent that outlined the instructions wasn't a priority amidst all of the other very important work you had to do, so please let me explain it here, for the second time: The steps include…*

Write: *The steps include…*

5. Use passive vs. active voice to your advantage

Active voice is a sentence in which the subject of the sentence performs the action. (John washes the car.) Passive voice is a sentence in which the subject of the sentence has an action performed upon it, him, or her. (The car is washed by John.)

Want to emphasize accomplishments or work completed? Use active voice.

My department completed the project on time. George, who works on my team, developed an incredible system to track users.

Want to deemphasize the person or the team? Use passive voice.

The project was not completed on time.

A system to track users was not developed, unfortunately.

6. **If you're pointing out mistakes or flaws, be sure to explain why behaviors, actions, or other issues are problematic**

Rather than: *You've arrived late to our one-on-one meetings the past three weeks, which is unacceptable.*

Write: *You've arrived late to our one-on-one meetings the past three weeks, which is unacceptable. As you know, I often have meetings scheduled throughout the day, and so this throws my schedule off. Further, while I'm sure you don't intend this, arriving late shows a lack of professionalism, which will undoubtedly hurt your career in the long run.*

7. **Talk to those who frustrate you by using "I" statements**

Rather than: *Your inability to show any enthusiasm about these projects is driving me crazy.*

Write: *It's difficult for me to maintain momentum and rally support here for projects when others show a blatant lack of interest.*

8. **Depending on your audience, and how much information they need, cut extraneous information and use short sentences for emphasis**

Rather than: *Considering the breadth and depth of this project, as well as our desire to complete it in a way that is most useful for you and practical for our* *own schedules, we've decided that extending the deadline would be an important next step.*

Write: *We need more time to do this well.*

Note: It's crucial to consider your audience when deciding how much background information they will need.

9. Directly state what's important

One additional, ***minor*** *consideration is...*
Another ***primary*** *concern is...*

10. STOP YELLING AT ME (avoid caps lock)

Rather than: *It's very important that you COME PREPARED TO THE MEETING.*

Write: *It's very important that you come prepared to the meeting.*

But <u>do</u> consider **other ways** to *emphasize* importance.

Use these strategies as you work to develop more effective, appropriate business communication, and, eventually, they will become second nature in your writing. In the meantime, the printable checklist on the following page can be tacked up by your desk as a guide and a reminder of these strategies. Any time you're unsure of your tone, compare your draft to this list!

Each interaction in the business world is unique and nuanced. While the strategies above are not a one-size-fits-all solution, learning to ask questions about audience, purpose, and the emotions attached to a particular communication is key to diplomacy and striking the right tone over email. From there, the tips and strategies above will help you craft careful, effective communications as you increase your writing skills—and your credibility in the workplace.

Diplomacy and Tone Checklist

Are you sending an email, particularly one about a "difficult" subject or situation? This checklist serves as a quick guide to writing and revising to ensure that your professional communication says what you want it to say in the most appropriate, effective, diplomatic way possible.

First, consider and jot down the answers to the following questions to guide your writing. (Consider this a very basic form of prewriting.)

- ✓ Who is my audience? What do they need to know, and what do they already know?
- ✓ Why does this email feel difficult in terms of getting the tone just right?
- ✓ Why am I writing? Am I informing my audience? Asking for help? Delivering bad news?
- ✓ Do I have strong feelings about the subject or situation that might get in the way of writing effectively and appropriately?
- ✓ Are there specific elements (anything from highlighting big problems to reminding the reader about an important due date) that I want to emphasis?

Once you have reflected upon these issues, take a first stab at drafting the email. Then, use the checklist below as you reread, rethink, and revise your communication.

- ✓ Have I reminded my reader what's in it for them?
- ✓ Have I acknowledged the work of others?
- ✓ If I can afford to hear a "no," have I asked, rather than instructed?
- ✓ Have I avoided passive aggressiveness?
- ✓ Have I used passive vs. active voice to my advantage?
- ✓ Have I explained the larger issues or repercussions of mistakes or flaws, rather than simply pointing them out?
- ✓ Instead of saying to my readers, "You messed up," have I used "I" statements wherever possible?
- ✓ Have I varied sentence length, considering short, punchy structures for emphasis?
- ✓ Have I directly stated what's important?
- ✓ Have I avoided YELLING WITH CAPS LOCK?

Practicing Intercultural Communication

こんにちは

¡Hola

!مرحبا

Habari

Здравствуйте

नमस्ते

שלום

Hello!

Knowing basic greetings in a foreign language is a great way to be polite when communicating interculturally. However, to fully communicate across cultures you need to be aware of the differences between each culture represented. Culture, more than simply art or music, is a deeply held set of beliefs, values, and expectations within a group that differentiates it from other groups. Culture impacts many of the tasks we undertake every day, and many actions that we do out of habit in the United States are conducted differently elsewhere. For example, in an American business meeting it is considered efficient and polite to get right to business. Taking ten minutes to see how everyone is doing may be seen as wasting someone's time. Meanwhile, in Pakistan it is considered impolite to begin this way, and meetings are begun with brief conversations about people's family, friends, etc.

Intercultural Communication (IC) is concerned with the ways individuals, organizations, and groups interact across cultural differences. We work in a world where corporate and nonprofit organizations routinely communicate with customers, clients, and other organizations around the world. IC focuses on how we can communicate between culturally varied groups while still adhering to each one's social nuances and expectations. As writers, our responsibilities include acknowledging the easy to see cultural differences (for example, do I bow or shake hands?) as well as those that are more subtle (how to work on an team made up of people from many different cultures).

Since so many of the decisions you make in IC emphasize cultural values, when you deal with IC, you often find yourself dealing with matters of ethics. Two very important pitfalls that need to be overcome are ethnocentrism and xenophobia. Ethnocentrism occurs when we consider our own culture to be of the highest importance and in turn judge all other groups in relation to our own standards. Comparing all other cultural norms to our own devalues the other culture instead of seeing its legitimacy. At its core, ethnocentrism threatens the voice of others and the legitimacy of their cultural beliefs, creating the potential for differing cultural values to be placed in opposition to one another. Xenophobia takes this a step further, as a xenophobic person is actually fearful of a new or unknown culture. Such reactions to cultures can lead to stereotyping and alienation. When working on a cross-cultural team or with an international client, it's important that all involved acknowledge each other's cultural differences and work respectfully within those parameters. Being ethnocentric or xenophobic in our communication makes us unable to build strong relationships or work cohesively within a cross-cultural group.

What does unethical IC look like?

Unethical or ineffective IC can ruin a professional relationship. In 2013, a group of native English speakers in Japan were hired as communication consultants for a Tokyo-based human resources company. The company wanted its English-speaking presentation materials to be clear and the Japanese presenters to improve their English speaking skills. The company clarified with the consulting team that it was not concerned with the Japanese presenters' ability to function in an American, Australian, or British boardroom—just to be easily understood.

One of the American consultants took an ethnocentric approach to these consultations and repeatedly corrected the presenters on matters of culture (telling presenters to add humor to a presentation, for example) and not following the agreed-upon strategy. Furthermore, the consultant routinely skipped over the company's established hierarchy and emailed supervisors with questions and concerns instead of addressing these issues with the team's appointed liaison. As a result of this ethnocentrism, the company did not receive the results it wanted from the consulting sessions, and the supervisors and liaison were insulted. Consequently, the consultant was fired.

In this situation, the consultant was convinced that the presenters needed to work within an American cultural frame, and ignored the needs of the Japanese company. In order to meet the goals of the consultations, the consultant needed to first be aware of the Japanese presentation style and how this differed from American style. Additionally, since professional hierarchy is very important in Japanese business, the consultant was expected to operate within that framework.

Should I be concerned with the role of my own culture?

The short answer is yes. While it is important for a writer to acknowledge and respect the variances of culture in the workplace, his or her own culture should be respected as well.

For example, in the United States and many other Western countries, it is important to recognize authorship when pulling research. We do this through a variety of citation styles and consider intellectual property important enough to be written into law. Copyright law and the elements associated with it (plagiarism, piracy, etc.), however, do not translate into all cultures.

In gift cultures, common in Asian and African societies, the role of copyright differs from that of the West. Some Asian cultures have traditionally viewed plagiarism in a much different light, and in China, for example, it's not uncommon for published work to be considered free to use at will. Not adhering to Western cultural norms like citation can not only cause an ethical problem, but also has the potential to lead the Western-based writer into legal issues.

How do we practice ethical IC?

While it can be difficult to prepare for all IC circumstances, discussing specific strategies can help prepare you. Managing the needs of various cultural norms requires the writer to understand where differing beliefs coincide and diverge, as well as how to relate his or her own cultural expectations to others. While each culture cannot always be represented in full, it is important to acknowledge and respect the distinct cultures of project team members, clients, supervisors, and colleagues. Consider the following scenarios and come up with ethical ways to manage these situations:

- You're working on an international team to develop a feasibility report on water distribution. The report is due in one week, but half of the team will be celebrating a religious holiday for three of those days. How do you ensure the report meets the deadline?
- You receive an email from a client regarding a project you've been assigned. The email is very abrupt and difficult to understand due to errors in English. You're not sure what the client is asking. How do you respond?
- Halfway through a project, you realize that the task would require you to infringe upon the intellectual property laws of your country, but not of the client's country. How do you proceed?

Making Sense

In workplace writing, your first job is to make sense. That may sound easy, but emails, instructions, and reports can often be frustrating to read because the writer had other goals in mind. Sometimes we're afraid our writing won't sound smart, or that we're committing obscure grammar crimes, or that we haven't written enough to satisfy the kind of page requirements we had in English class. But when we write purely to sound smart, to avoid grammatical errors, or to fill up space, the result is often difficult to read and understand.

Take this example from a job application letter:

> I think that it is agreeable to say that these skills and experiences stand to fulfill the requirements of such a position for a company that requires these things from all of the services that they offer, particularly in this market.

The writing is grammatical, uses a lot of multi-syllable words, and certainly fills up space. But what has the writer said, exactly? If they're trying to explain why they should be hired, all they've managed to do so far is say they have skills (but not which specific skills) that the company is looking for. Not very convincing.

Every piece of writing in the workplace has a purpose. Sometimes the purpose is very small and specific. Let's say you're trying to schedule a meeting with your boss. You want to discuss problems you've been having with the accounting software your company uses. Because you're talking to a superior, you want to sound formal and respectful. You might be tempted to write a sentence like this:

> I would like to take this opportunity to extend to you an invitation to converse at your earliest convenience to discuss a number of computational difficulties I have heretofore experienced.

Your boss will probably be left scratching her head. You've managed to sound formal, but it's not clear exactly what you're asking for. If you focused on your purpose (scheduling a meeting to discuss a specific topic) you might write something more like this:

> Would you be available to meet this week? I'm having trouble tracking our inventory with the new software.

There is nothing unprofessional about your tone here, even though the words you're using are far simpler, and the individual sentences are much shorter. It's also much more clear what you're asking for and why.

By focusing on the actual work that you're trying to accomplish, it's a lot easier to decide what to say and how to say it. That's true for single sentences, short emails, and even longer documents.

Remember that what "makes sense" to one person may not make sense to everyone else. That's why, in addition to understanding your purpose for writing, it's also important to understand who you're writing for. The writer of the following sentence, for example, made a lot of assumptions about who would be reading it:

> The coordinator of the stakeholder engagement process should report the results in an appropriate and timely manner.

If you know your readers are familiar with what a "stakeholder engagement process" is, who coordinates it, and how to write a report about it, then the sentence makes sense. Without that information, it would be difficult to know what the readers are being asked to do. And even if we are familiar with the stakeholder engagement process (whatever that is), the writer is also assuming that we know what "appropriate" and "timely" mean in this context. Is the report due a month from now, next week, or tomorrow?

Sometimes your readers will be a large group of people with different interests and backgrounds, or a more defined group (like shareholders, technicians, or customers), or even specific people you know by name and interact with on a daily basis. In any of these cases, the more you know about who you're writing for, the easier it will be to figure out how to make sense for them.

Compression

Compression is using fewer words to convey more information. One of the simplest ways to compress your writing is to find unnecessary words and phrases and simply delete them. For example, this sentence contains some useful information:

> Meredith is a person who likes ice cream.

Now we know a little about Meredith. The phrase, "is a person who," however, isn't really contributing a lot. Unless it's particularly important to explain that Meredith is human, we could probably get away with something like this:

> Meredith likes ice cream.

The sentence still conveys the same information, but is four words shorter.

If we look at something a little more technical, like the operation of a mechanical device, we can see how compression helps a piece of writing achieve its purpose more efficiently.

> There are four phases that contribute to how a refrigerator functions the way it does.

The phrase "how a refrigerator functions the way it does" is not ungrammatical, but it does contain a lot of words. A shorter, more direct version of that same sentence might be:

> There are four phases that contribute to the function of a refrigerator.

There's even a single word that means "the function of a refrigerator," so a shorter version might be:

> Refrigeration occurs over four phases.

Now we've reduced the number of words in the sentence from fifteen to just five. Ten words may not seem like a big difference, but over the course of many sentences, across a longer document, you can potentially remove hundreds of unnecessary words and, more importantly, save the reader a lot of time.

Compression isn't just about removing unnecessary words, though. It's also about including more information in those shorter sentences. Now that we have our simple, five-word version of the sentence, we can think about what other information might be included without sacrificing the clarity and readability of the sentence. For example, we might name those four phases now:

> Refrigeration occurs over four phases: evaporation, compression, condensation, and expansion.

The sentence is still shorter than the original (it's ten words, now), but it also contains more information.

In workplace writing, the shortest version of a sentence is almost always the best version. This does not mean that your writing needs to sound robotic. Workplace writing is often about more than simply conveying information. Being respectful, personable, and sometimes even funny are all important goals a piece of writing can achieve, in addition to being brief and clear.

But keeping your writing as short and meaningful as possible is a good way to let the people you work with (and for) know that you respect them and their time. One of the most important things to understand about any reader is that no one likes to have their time wasted.

Kairos

“Kairos” is an ancient rhetorical concept that has gained importance in many different disciplines over the centuries. Kairos is knowing what is most appropriate in a given situation. For our purposes, let’s think of it as saying (or writing) the right thing at the right time. It’s sort of the Goldilocks rule of writing: you don’t want your message to be too big, too small, too soft, or too hard; it should be just right.

Appeals to kairos in written form try to make use of the particular moment—attempting to capture in words what will be immediately applicable, appropriate, and engaging for a particular reader. Kairos is timeliness. It means taking advantage of, or even creating, a perfect moment to deliver a particular message. It means crafting serendipity.

Consider, for example, Dr. Martin Luther King Jr.’s famous “I Have a Dream” speech. The speech was rhetorically powerful: it changed minds, persuaded people to support the civil rights movement, and served as a powerful rallying cry for a generation of reformers. But the speech was so powerful in part because of its kairotic moment: the timing and atmosphere of the speech lent themselves to powerful oratory. Together, the “where” (the steps of the Lincoln Memorial in Washington, D.C.), the “why” (the culmination of a march on Washington by thousands of members of the civil rights movement), and the “when” (during the centennial celebration of the Emancipation Proclamation, at a time of day when broadcast networks could carry the speech live, and during a march which had drawn more than 250,000 people to the capital) created the perfect moment for King's message to reach the largest number of receptive listeners.

So far, kairos seems pretty slippery, a sort of "I'll know it when I see it" kind of principle. In some ways, kairos represents the ephemeral, "fleeting" nature of "the right time." In terms of writing, we try to capture the moment of balance, the kairotic moment, and thus move the audience by appealing to that specific context.

A good way to think about kairos is to consider how writers try to persuade readers based on unique timing and current events. For instance, consider the way restaurants, bookstores, and various campus entities appeal to incoming freshman students. Vendors have signs declaring "New to USF? Join this club to meet new people and learn about the campus!" and "First-year students, this week only: $100 off your first month at this apartment building!" They reference the particular moment, first stepping onto a new campus, to persuade you to do everything from opening a new bank account and buying logo bumper stickers to ordering a dozen pizzas. Effective uses of kairos take advantage of the particular time and place to make texts unique and give them a sense of immediacy.

For your own writing, you can skillfully employ kairos by doing the following:

- Examine the rhetorical situation, the factors that create that particular moment.
- Consider the timing of your text.

- Appeal to the specific context.

By using kairos as a guiding principle for your own texts, you can bring interest and timeliness to your writing projects. So when you begin to write, think of the moment that your writing will enter—the audience that will read it, the conversation that it joins, the history surrounding the topic, and the words you use to craft your argument. Awareness and use of this knowledge create writing that, like turning the key in your door, seems perfectly timed, effortless, and just right.

Here are a few possible examples of kairos:

- **A call to act.** An appeal to some particular fast-approaching moment is often a writer's attempt to create a perfect kairotic moment for his or her message by creating a sense of urgency. You've likely seen a commercial or infomercial that pleads with the viewer to "Call now!" to receive some important prize or to avoid missing some sort of opportunity; this type of commercial or infomercial employs kairos.
- **The use of deadlines or goals.** Such appeals to kairos are often seen as part of fundraising literature: by connecting a reader's or listener's response to a particular deadline or goal, the writer creates urgency and excitement.
- **References to current or impending problems.** Such references are prevalent in political and social campaigns. Consider, for example, the large number of financial bills, laws, and investigations undertaken by legislative bodies throughout the country after the most recent economic recession. Lawmakers were responding to and taking

advantage of the kairotic moment created by the crisis in order to persuade their fellow lawmakers and constituents to support a particular fiscal policy.

APPLICATIONS

Resumes

The resume is one of the most important professional documents you will ever write, but many people mistake the basic purpose of the resume. A resume by itself does not often lead directly to getting hired. Instead, the purpose of the resume is to get you an interview. A well-written, well-organized resume should give an employer enough information to put you on a list of people they would like to know more about. Hiring decisions are generally only made after the employer has met with the top candidates.

Another mistake people make about resumes has to do with completeness. For most people, it isn't necessary to list every job you've ever had, every organization you've ever been a member of, and every extracurricular activity you've ever participated in. A resume is really a summary of your most impressive experiences and accomplishments. What does "impressive" mean? Well, it depends on the position, the employer, the field, and on your own sense of what makes you the best candidate. The more you know about your prospective employer and the work you'll be doing, and the more you know about yourself, the easier it will be to determine what makes it onto the resume and what doesn't.

Read the Job Ad

Job advertisements can be a little daunting. A typical job ad will list what kind of skills, experiences, proficiencies, and personal qualities that the employer is looking for. For example, here is a passage from a job ad for an environmental engineer.

> The ideal candidate will have experience in the following areas: managing remediation and hazardous waste abatement projects (e.g groundwater, soil); Knowledge and experience managing solid PCB remediation projects (sealants, caulk, and coal tar); Negotiating permits, cleanup objectives, and site closures with regulatory agencies including EPA, California Department of Toxic Substances Control (DTSC), Regional Water Quality Control (RWQCBs) and CUPAs (Certified Unified Program Agency).

An easy way to tell if you are a good fit for this job is whether or not you are familiar with all of these terms. Are words like "abatement" and "remediation" meaningful to you? If not, you may want to keep looking.

On the other hand, many people pass over certain job ads because they don't have every single one of the requirements listed. For example, you may have years of experience with all the procedures listed in the above job ad, but you haven't worked with all those agencies listed at the end. That doesn't necessarily disqualify you from the job. A lot of job ads are written by multiple people who want to include every possible qualification they can think of. No candidate will meet all of them. When in doubt, apply to the job. Let the employer be the one to decide if the one or two things you're missing are deal breakers.

You can also use keywords from the job advertisement to show your potential employer that you have many of the skills the ad describes and that you're well prepared for the job. What responsibilities, qualifications, or skills does the job ad list specifically? Pay special attention to words that appear more than once. In the job ad above, one keyword might be "remediation."

Using keywords from the job ad is a good idea for another reason. Many employers use resume-screening software to narrow their applicant pool. This software assigns your resume a relevancy score based on a given set of desired keywords. If your resume is missing those keywords, the likelihood of it reaching a potential employer is slim.

Go Beyond the Job Ad

In addition to reading the job ad closely, there are many other places to find information about a given job and organization. Almost every company has a website where they tell you a little about who they are and what they do. Some companies even have corporate philosophies or guiding principles. "The Toyota Way," for example, explains how people in Toyota view the work they do. You might think that all major automobile manufacturers are alike, and that working for one will be like working for another, but if you read "The Toyota Way," you'll see that Toyota definitely believes they are unique. Using ideas and terms from their corporate philosophy (like the concept of "continuous improvement") can help demonstrate how your goals and interests align with theirs.

Another way to get more information than is listed in the job ad is to contact someone within the company and ask questions. A phone call or email that begins “I was interested in applying to this position and was wondering what else you can tell me about it,” can help give you more insight into what the employer is looking for. It also demonstrates a level of interest in the job that other candidates might not be showing. In fact, some people get interviews simply because, out of all the similarly qualified candidates, they were the one that contacted the company for more information. The employer was able to get a sense of who they were over the phone, that they were enthusiastic, personable, and intelligent, and decided to meet them in person.

Just as you can research a company, you can also research specific people in that company. If you know who will be making hiring decisions for the position, try to find their resume online. What experiences did they list? What is the structure of their resume? Do you have any mutual connections or common experiences? You can use this information to help make decisions about your own resume.

Cover Letters

Starting a cover letter can seem daunting when staring at a blank document, but cover letters actually have a straightforward and easy-to-follow organizational plan. By the time you have the letter formatted and make a few important decisions about which qualifications are best for this particular job, the letter is almost finished. By being direct, concise, and clear, your cover letter can help you stand apart from other applicants.

Before beginning, look over your resume again, review the job ad, and consider keywords and values that are important to the company. There should be some overlap between your experience and interest and what the company is looking for. Use the same keywords in your cover letter to better align yourself with the company's goals and the position's requirements and responsibilities.

Use standard business letter format (you can look up this format online if you're unsure how to write a business letter). The body of the letter can be broken down into three basic sections:

First section:

- Tell the employer which job you are applying for and where you saw the ad. Explain why you're applying for the job and introduce your best qualifications (the qualifications you'll talk about in the body of the letter). This section provides an overview of what's coming.

- If you're still a student, be specific about where you go to school and when you'll be graduating.
- If you've had any prior contact with the company (at a job fair, for example), mention where and when this was. If you know someone within the company, you might also want to mention them as well (especially if they would recommend you).

Second section:

- Pick your one or two best qualification or experiences from resume. Go into more detail about these experiences. If your resume is a short summary, just the highlights, this is where you can provide a fuller picture. Think of this section as story-telling; it's important to show how you're qualified, not just tell. If a job ad asks for a candidate who is "detail oriented," talk about a specific experience where getting the details right mattered.
- Use examples from school or work, whichever makes the most sense, to back up the claims about your candidacy. Any experience can be relevant to an employer if you make the connections between your experience and their job.
- Talk about what you gained from the experience. You want to demonstrate not only that you've had experiences, but also that you gained something from them (skills, qualities, understanding) that you can bring to the new job.

Third section:

- Close with a request to to set up an interview, indicate how you can be contacted, and thank the employer for their time in considering your application.

At some point in these three sections (usually in the second or third), you should explain your interest in being considered for the position. Be specific about what attracts you to this particular job at this particular organization. What sets them apart in your mind?

When signing off, use a formal closing (called a *valediction*) such as “Sincerely.”

Establishing a Web Presence

The web, and social media in particular, can present a number of potential pitfalls for job seekers. There are any number of stories about people either not being hired (or even losing their jobs) because of something they posted online. But the web also offers a number of potentially beneficial opportunities to showcase what makes you an excellent hire. The key is to carefully craft your digital identity. This section offers three spaces that might be of use as you establish yourself online. These spaces are also useful in that they offer interesting ways to connect with those who might hire you.

LinkedIn

LinkedIn allows you to connect with friends and colleagues and receive endorsements from those who know your work. The site also allows you to follow and connect with companies and professional or scholarly organizations.

What kinds of information should you provide?

- Job Titles
- Employers
- Years employed
- A description of skills developed via the position
- Projects/publications/presentations
- Education
- Skills (for which you can receive endorsements)
- Professional affiliations

How might you use it to connect with potential employers?

Jobs on your homepage: Once you've completed your profile, LinkedIn will suggest positions and companies that might fit your professional profile.

The "Network" tab: This section of the site allows you to add connections using your email contact list. It also offers suggestions for people you might know or want to connect with.

Follow a company: Following a company for which you're interested in working allows you to receive status updates about current projects, topics of interest, and positions. This information will help you tailor your cover letter/résumé to match their current priorities. Additionally, from the company page, you can see employees at the company who might be friends or friends of friends; these are people you can connect with on the site. You can also find current job opportunities and links to online application systems.

Professional Website

A professional website provides a venue for you to create a coherent professional or scholarly profile by placing your CV/résumé, current writing projects, teaching philosophy and materials, etc. all in one space.

What kinds of information should you provide?

- Homepage that contextualizes your professional or scholarly identity
- Blog (but only if you plan to update it fairly regularly)
- Teaching materials and/or a professional portfolio
- CV/Résumé
- Major Projects
- Links to professional social media profiles

How might you use it to connect with potential employers?

This site acts as a professional portfolio. The blog feature also offers you an opportunity to engage with issues or events of interest to the field you wish to enter.

Twitter

Twitter allows you to engage directly with working professionals and scholars, often including well-known luminaries in the field.

What kinds of information should you provide?

- A professional photo
- A professional username
- A bio that positions you as a member of the field
- A list of people you follow that features members of the field

How might you use it to connect with potential employers?

- Retweeting posts from well- known members of the field or from a particular organization/current employees
- Responding to questions or links with substantive answers or suggestions
- Tagging members in the field in tweets with relevant resources
- Posting links to news stories or your own work on topics of interest to the field/organization

Business Plans

A business plan is a proposal that answers some very specific questions about a new business you want to start. Questions answered in a business plan are of a very practical, and, frequently, financial nature. You're answering these questions for potential investors, but also for yourself. For example:

- What, exactly, are you selling?
- Who are you selling your product or service to?
- Why would they come to you instead of someone else?

Of course, your business plan will answer many more questions, but once you have answers to these first three, you'll have a much clearer sense of how to answer all others.

As you can see, business plans are all about anticipating questions and providing answers at the right time, so here are some questions that will get you started as you create your own business plan.

Why write a business plan?

Whenever you sit down to write, it's good to have your goals for the document in mind—especially a longer, more complex document. Fortunately, the goals of a business plan are straightforward: proving to interested parties that you have a clear vision for your business, outlining a plan to make that vision happen, and asking for money to help you get that plan off the ground.

Who am I writing for?

Knowing your reader helps you to predict the questions they will have, and the reader of a business plan is usually some kind of investor. That reader may be a venture capital firm, a bank, a prospective partner, or employees you want to bring onboard right away. When you write your plan, think about what these different types of readers need to know to feel confident that their investment—time, money, services, labor—will be profitable.

What should I include?

There is no one right answer for this question. Different types of information will be essential in different markets and to different investors, but, in general, the following topics are addressed.

Executive Summary

The executive summary is vital to your business plan because it establishes right from the start your vision for your business. It includes your mission statement and the specific products or services you provide. You also may wish to include information about when and where the business was founded, growth and financial highlights, and a summary of future plans. Whatever you include in this key section, the executive summary should place your business center stage in the readers' minds.

Market Analysis

A rigorous Market Analysis demonstrates to the reader that you know your industry and target market. It should highlight your research and findings, so your numbers are crucial. Show the readers specific statistics and percentages as you discuss your target market and its distinguishing characteristics. Also, make sure you do a Competitive Analysis that identifies your competitors and their market share.

Market Strategy

If you've done your job in the Marketing Analysis section, you can leverage that information to explain how you will break into your market and target your core demographic(s). This section details your market penetration and growth strategies, as well as your distribution and communication strategies.

Financial Analysis

There are many different ways to approach the questions about your business' financial goals. The type of information included here depends significantly on the nature of your business (e.g., food sales vs. durable goods; or in-store vs. online sales), as well as the current state of your business (e.g., just starting out with no funding or sales vs. some sales or funding already in place). However, in general, this section is built upon financial projections, including historical and prospective data. If you are going to request funding, this is where you do it.

How do I write the plan?

You want to create a well-developed and informative, but readily accessible document. This means the following:

- Use headings and subheadings that are short and simple, and identify clearly the content of the section.
- Use a consistent format for your headings and page numbers, source citations, etc. Design your document for scanability, so readers can find the information they want quickly. Proofread closely for inconsistencies.
- Use tables, graphs, charts, and bullets. If you've done your job well, you will be giving your readers a lot of data. Make the data easy to interpret and absorb.
- Be concise. Use only and exactly the words you need to communicate your ideas. Avoid long, complex sentences that slow the reader down.
- Say the important stuff first. Spoilers are encouraged. If you wait until the end of a section to deliver the goods, investors might stop reading before they get there or need to reread a section, neither of which you want.

Where do I start?

This one is easy: research, research, research.

- Research your industry
- Research your market
- Research other business plans written by similar businesses (e.g., similar in type, region, or business model)

This research is the most important work you'll do as you develop your plan. Not only will you find examples that you can use as templates for your document, but you will learn all about your niche and how it fits into the larger business community. Whether you are opening a pizza place, starting a dog walking service, or looking to sell the flying car you invented, you'll be able to provide the answers that prove you can make your vision a profitable reality.

Memos

Memos are documents written within a workplace for other members of that workplace. They don't go outside of an organization, so the public usually never sees them. Memos bring attention to a problem and either offer solutions or ask for advice on how to solve the problem. Memos are usually short—one or two pages—and use headings to signal different sections to the reader. Headings and lists within a memo can help the reader navigate the content better.

Some common sections include: a header; opening and context; and whatever action is required of the reader.

Format

Header

The header follows this general format:

> TO: (reader's name and job title)
>
> FROM: (your name and job title)
>
> DATE: (complete and current date)
>
> SUBJECT: (what the memo is about)

The memo should be addressed to the full name of the recipient and the subject line should highlight exactly what the memo is about. For example, “Microwave” is rather vague. A better subject line would be “Cleaning the Microwave” in order to best describe the content of the memo. Some readers might only read the subject line before deciding to open the memo, so make sure you are specific.

Introduction

The first real paragraph of the memo—the introduction—has to do three things: explain **why** you’re writing, explain **what** you’re writing, and tell the reader **what to do** after reading the memo.

Why? State the purpose of the memo by clearly describing the problem, the context of that problem, and any necessary background information on the issue. Are you writing because you need the reader to make note of a new policy? Another example goes here?

What? Summarize the rest of the memo in the most direct and concise way possible. This may be as far as the reader gets, so make it very clear what the rest of the memo contains.

What now? Make sure the reader knows what action is now required of them. People don’t write memos because it’s fun. Something needs to happen now. Are you asking the readers to attend a meeting, donate money, or clean the microwave after “accidentally” blowing up their hot pocket? Any required actions should be clear and include necessary information that the reader needs, such as a deadline.

Example

Unformatted example memo:

DATE: March 18, 2016
TO: Department Managers
FROM: Safiyya Dev, Store Manager
SUBJECT: Customer Service Excellence Nominations

Submit your nomination for the quarterly Customer Service Excellence Award by April 8 using the attached form. Each manager may submit one nomination.

Do you have an employee whom you feel fortunate to have in your department? Does this employee show a positive and professional attitude when helping customers? Do you get frequent comments about this person's friendliness and helpfulness? Now you have an opportunity to give this employee the recognition they deserve.

According to nominating criteria, nominees must

- demonstrate excellent customer service consistent with Variety Craft Supplies' policies;
- have worked as Variety Craft Supplies for at least six months
- work 20 or more hours per week;
- not have received the Customer Service Excellence Award within the last year;
- have a record clear of oral and written warnings for the last six months; and
- have no work absences within the last six months

The winner of the award will receive a framed certificate and a $100 check.

A nomination form is attached. Please complete and return it to me by Monday, April 8. Thank you for your help in identifying and rewarding excellent customer service representatives.

Press Releases

Sometimes businesses and organizations want to inform the public about a new product, an upcoming event, or the latest development in an ongoing situation. In circumstances such as these, businesses and organizations will send a press release to journalists who write about their field or industry. Press releases usually include a few simple components:

- an informative title that summarizes the main idea of the press release
- the date the information can be shared with the public and the location of the organization
- the information the public should know
- a little information about the organization that wrote the press release

One of the most important things to remember about press releases is that they are meant for an external public audience. While much of your writing may be for subject matter experts or business personnel who are at least vaguely familiar with your organization and field, press releases should be able to reach people with little or no familiarity with what you do.

As fascinating as you may find transmissions, electronic medical record systems, or a sports team's latest hire, not all readers will share that same level of knowledge or interest. With that in mind, control the amount of detail you use. Provide enough background information about the topic for the reader to understand the context of the announcement, and then move on to the announcement itself.

Generally, you will begin by providing a few sentences giving the most pertinent information you want the public to know. You will then spend the next couple of paragraphs adding brief contextual information and providing additional details about the product, event, or development. Remember that if this piece of news is about an ongoing situation, some people have likely been following the story from the beginning, and some are probably hearing about it for the first time. Consider these two types of readers as you provide context.

While there is no standard word limit for press releases, the key is to be brief and keep the reader moving quickly. For this reason, press releases are usually written in short paragraphs that make content is easy to skim.

Avoid using too much jargon. It is almost always better to use everyday words and expressions in a press release so that you can reach people of different areas of expertise and backgrounds. You may need to include some technical terms and concepts, but consider quickly defining them so that every reader understands the importance of the subject matter.

Finally, the best way to get a good sense of how to write a press release is to look at a lot of examples. Most large organizations have a “Press, ”News,” or “Media Resources” section on their official website where they collect their most recent press releases. Apple, Coca-Cola, and Northrop Grumman all have extensive press release collections that deal with a variety of new technologies, projects, policies, and programs.

Elevator Pitches

Imagine you are alone in an elevator. As the door begins to close, you hear a voice asking you to hold the door, so you do. Now, you find yourself standing next to a company executive or investor who could make your business idea a reality. You have the duration of an elevator ride to pitch your idea. Are you ready?

What Is an Elevator Pitch?

An elevator pitch is a brief presentation of a plan or idea to someone who can help you achieve your goal. You will be asked to convince your audience that your business plan is a viable concept for a new establishment. It's okay if your idea isn't revolutionary, and you don't have to pitch it in an actual elevator, but you want to be prepared with a short summary that explains what you want to do and why it will work.

Tailor Your Pitch

If you can, consider who you'll be giving your pitch to. Research not only the company, but also the people you're likely to encounter. Tailor your pitch to the ideals, values, and track record of those investors and decision makers.

For example, if you're pitching a new cleaning product to a group of investors who care about the environment and sustainability, you might emphasize that your product is made using all-natural ingredients. If you're pitching to investors who are more interested in the people behind the product, you might instead emphasize the experience of your team.

Your team's exprience and the formulation of your product will probably be worth mentioning to both sets of investors, but emphasizing what your listeners care about is a good way to make the most of their attention.

Brevity is Best

Keep your elevator pitch short, usually around 200 to 300 words. Talk at a normal pace (not too fast). You don't have to cover all the information you've prepared, but you should get to the most important, convincing details toward the beginning. If your pitch goes well, your listeners will ask for more information after you've finished.

Make It New

Nobody wants to hear the same idea they've heard a thousand times before. Understand that investors listen to a lot of pitches, and your pitch may not even be the first they've heard today. Even if your idea isn't revolutionary, find a way to differentiate yourself from similar products or services. A good pitch explains how your idea differs from (and improves on) any competitors.

Over-Prepare

It's important to be prepared for questions from your audience. Research similar businesses, local markets, and customer bases. Then, discuss your idea with as many people as possible while revising your pitch. They'll help you develop answers to questions you may not have anticipated on your own, and help you understand what your idea sounds like to someone hearing it for the first time.

Characteristics of Effective Elevator Pitches

Most experts agree that, at minimum, your pitch should include the following:

The Hook

Demonstrate a need for your idea with a quick phrase, problem, or situation your audience can identify with.

Example: "As a working parent, I have the hardest time keeping baby spit-up off my business suits."

Who Are You?

If you or someone on your team are an expert in this field or have some important relevant, experience, work that connection into your pitch.

Example: "I'm a mother of two and I have this problem all the time. I can't show up to a meeting smelling like spit up! The parents on our team agree;

finding a product that helps balance home and professional life is something we all need."

What Is It?

Describe what service/product you intend to sell and why it will be successful.

Example: "So we invented Messy Movers, a wipe that quickly cleans up stains from natural sources like spit up and juice, helps the spot dry quickly, and leaves behind a fresh scent."

The Market

Who are your competitors, and what sets you apart? Describe how your idea is different and will scratch a different itch or tap into a new market.

Example: "This wipe is different from existing products because the formula is targeted toward stains parents encounter and they don't leave a chemical odor after use."

The "Ask"

Tell your audience what you need. How much money do you need to start the business, how much you think you will be able to produce (in units, gross sales, revenues, etc.), and the timeframes you forecast accomplishing these things? How long will it take to turn a profit? What are the projected sales numbers over that time period?

Example: "We are looking at about $250,000 to ramp up production in the next quarter and cover marketing fees. We're projecting sales of 20,000 units in the third quarter of this year once we get production rolling. Having your company behind us would be a strong market position for both of us."

Call to Action

Finish with something the person you are speaking to can *do*. Perhaps you can invite them to a demonstration of your product or a tour of the space your business has set up. It could even be a simple as asking them to email you if they want more information and handing out a business card. Have this closing line ready. It may come naturally at the end of your full pitch, or you might need to do something unplanned because an opportunity opened for you. Rehearsing a strong closing line will make it sound like you're keenly aware of both your product's best attributes and the busy schedule of your listeners.

Example: "If your company is interested in expanding its product line into wipes like these we would love to partner with you. "

Follow Up

Offer to continue this conversation at the listener's earliest convenience. Make yourself available. Have contact information (usually a business card) ready.

Example: "This is my information, and I'd like to continue this conversation over lunch or a tour of our facility."

Presentations

As important as writing is in many workplaces, lots of important ideas and information is also delivered in the form of presentations. There are all kinds of situations where you might be called upon to explain something verbally—at conferences, in meetings, in short hallway conversations—but this chapter will focus on traditional presentations in which you present with the aid of a projector and slides.

Public speaking can be stressful, but having a clear sense of what you want to say and why it's important to the other people in the room can help relieve some of that anxiety. Who are you presenting for, and why would they care about what you have to say? Once you can answer those questions, it will be easier to make decisions about the content and style of your presentation.

Dealing With Nerves

You're probably going to be nervous. That's okay. It's intimidating to stand in front of a group and give a presentation, no matter how short. If you acknowledge ahead of time that you will be nervous, at the very least it won't be a surprise. And if you don't get nervous, there are lots of opportunities for public speaking in most fields. Being comfortable presenting to groups of people can often lead to opportunities for career advancement.

Practice. A lot. Practicing won't take all the anxiety away, but it gives you control over how comfortable and familiar you are with your material, and that will be one less thing to worry about. Also, try practicing at a slower-than-normal speaking pace. Being nervous often makes people speak too quickly.

Crafting Your Presentation

Presentations differ than written documents in many important ways. That may seem obvious, but the reason why many presentations fall short is because the presenter is simply reading a written document out loud, with slides that simply reiterate what they're currently saying. Thinking about the differences between speaking and writing can help you figure out how to get the most out of your presentation.

The biggest, most obvious difference between speaking and writing is your own presence. You aren't usually in the room when someone reads your emails, memos, or reports, so you can't tell how your words are being received in the moment. Is your point clear? Was your joke funny? You might get feedback, but it will be after the fact. In a presentation, you can see whether the audience is nodding or scratching their heads. You can tell if they're laughing at your jokes. And because of this immediacy, you can tailor your delivery, you can add more depth or clarity, or throw in some more jokes. This is one of the reasons why eye contact is so important. Not only does good eye contact make you more engaging to the audience, it helps you see whether the audience is still with you.

Your presence also allows the audience to form a much quicker opinion about the person behind the words. In writing, you usually have to read for a while before you get a sense of the writer. In person, these assessments happen right away. Consider your appearance as the first statement you make before you begin presenting. What speakers wear can enhance or detract from their talk because it sets up an audience's expectations of what is to come. If a speaker is wearing formal business attire, the audience will likely anticipate a formal presentation. If a speaker is wearing jeans, the audience will probably expect a more informal presentation. Pajamas are usually not appropriate; however, there may be some circumstances, such as a presentation on sleep health, where pajamas might help the audience engage with the subject.

When choosing what to wear, whether formal or informal, think about how your audience will "read" your outfit. This may be literal; if you wear a t-shirt for your favorite sports team, your audience will notice the logo. The audience may try to make connections between the team and your presentation, even if the two are unrelated. If you look like you slept in your clothes—not the aforementioned pajamas—your audience may question how prepared you are for the presentation. If you are concerned about your selection, ask a friend or colleague for their first impressions of your look.

Another obvious but important difference between presenting and writing is that presentation slides are best suited for images, not text. In a written document, the reader has time to consider large passages of text. They can pause, skip ahead, or re-read. In a presentation, you are always moving forward, and so too much text can be difficult for audience members to process.

Also, if there is too much text on a slide or handout (say, an exact transcript of everything you're saying), your audience might read it instead of paying attention to you. They might also be so frustrated with large blocks of text that they tune out completely. Consider including only a few keywords or main points per slide to keep you and the audience engaged with you as a speaker.

Visual elements, on the other hand, like diagrams, charts, tables, and even photographs, are an important part of most modern presentations, especially when they help illustrate or prove a point you are making. A compelling chart has an immediate impact that plays to the strengths of presentations.

Another trick: Make sure there is sufficient contrast between your text and the background colors, and make sure your text is large enough for your audience to see clearly from the back of a room. Some veteran presenters recommend that no text be no smaller than 30 points.

Once you've finished, make sure to create backup copies and have them on-hand the day of your presentation in case something goes wrong (and something always does go wrong). Flash drives, cloud-storage, or email are all useful options, depending on the technology where you will be presenting. It's a good idea to ask about the space in which you'll be presenting ahead of time. What technology is available? Who will be there? How big is the room? Will there be clowns AND smoke machines or just smoke machines?

Practicing

Timing yourself is a very useful exercise. It's hard to know how long it will take you to say all the information you've gathered mentally or in writing. Using a timer (an egg timer or an app on your phone) in your practice can help prevent you from running over (which can lead to restless listeners) or under (which can lead to an uninformative presentation) on the day of the presentation.

Practicing in front of others is helpful. It can be difficult to keep an audience's attention if you are focused on notecards or a slideshow. Make eye contact with audience members so they know you are talking directly to them. If direct eye contact makes you uncomfortable, you can look toward the back of the room immediately over people's heads. Similarly, it is also important to practice how you will move during your presentation; an unmoving figure in a dark corner does not attract much attention. We also encourage you to make movements that are comfortable for you. The more comfortable you appear, the more engaged your audience will be. For example, you may choose to have your hands in your pockets because it makes you feel more confident and less nervous. You may also have specific hand gestures timed with important points in your.

Afterward, you can get feedback on elements of your presentation like the pacing of your voice or places where your audience wanted more information before the final product is due. If you don't have anyone to practice in front of, recording your voice or standing in front of a mirror can serve as similar checks.

Finally, creating note cards that include main points, key quotations, transitional phrases, or other helpful reminders that you can refer to throughout your presentation is always a good idea. After practicing, you'll have an idea of what you need reminding of—for example, if know from practice that you speak too quickly, putting in reminders like "pause" or "breathe" or "slow down" might be exactly what you need to make your presentation enjoyable and memorable

Whatever you decide to wear, make sure it's something you've (recently) worn before. It is important for you to feel comfortable in what you're wearing. Practice walking and talking in your selected outfit to make sure you feel confident.

Question & Answer Sessions

After some presentations you may have the opportunity to receive questions from the audience. While this may sound intimidating, it is a useful tool for both parties: audience members clarify statements you've made and you learn where and how to tighten up your presentation.

When asked a question, restate it to make sure you've understood it correctly. This will also give you time to think of an answer. Pause for a moment to gather your thoughts. Pausing is not usually noticeable to the audience, but can strengthen your answer.

If you are asked a question you do not know the answer to, say so. Honesty is more important than trying to come up with the "right" answer, and it will be obvious if you don't know what you're talking about. Thank the audience member for the question and offer to follow up later.

Data Visualizations

When a TV meteorologist explains that northern Florida has highs in the 70s, central Florida has highs in the 80s, and southern Florida has highs in the 90s, that information is usually accompanied by a map. In addition to numbers that display the temperature, the map also presents a range of colors, with yellow representing a certain range of temperatures, orange representing a warmer range of temperatures, and red representing even hotter temperatures. These colors provide the audience with an additional way of understanding weather patterns. It's not that we don't understand that the "110°" hovering over Brownsville, Texas is extremely hot, but the dark red color of that area reinforces the idea, making it easy for us to quickly absorb the information without having to examine each of the posted temperatures.

Most professional writing can benefit from some sort of visual element, especially if there are a lot of numbers or other data involved. Data visualizations such as graphs, charts, tables, and maps organize and communicate information in a way that's accessible to multiple audiences. Depending on the type of visualization you use, you might help the reader quickly locate specific values on a page or identify patterns hidden within the data.

There are many different types of data visualizations that can be used, depending on the purpose of the writer and the needs of the audience. Maps can be used to show not only high and low temperatures but also to identify voting patterns or levels of income across a country. Records of high and low temperatures for the past ten years, or how much people in different professions make annually, can be presented in tables. Tables can also be used to compare and contrast different products. Sales records may be tracked using a line graph in order to see the rise and fall of sales throughout a quarter or a year; these same records could be presented in a table if the purpose is to be able to look up how many of a particular type of item was sold in a given month, quarter, or year.

Why Visualize Data?

Numbers don't speak for themselves. We like to think so, and numerical data can help us make a point very persuasively. But large bodies of numerical data do not often lead the reader to clear, immediate conclusions about why that data is valuable, or what to do about that data. If we want the reader understand the data a certain way, even if it seems obvious to us, data visualizations help us organize and summarize data, and help us show people the relationship between different pieces of information.

We don't have room in this book to go over every possible way to visualize data, but if you want to design in-depth, effective visuals, you should look up Stephen Few's or Edward Tufte's books, or visit the Periodic Table of Visualization Methods on the web. The following are some descriptions of common genres and best practices for some of the types of visualizations you may use in your professional and technical communications classes and real world writing experiences.

Tables

Tables are useful if you want the reader to be able to look up specific values. Your professional and technical communications instructor, for instance, likely keeps some form of a gradebook like Table 1:

Table. 1

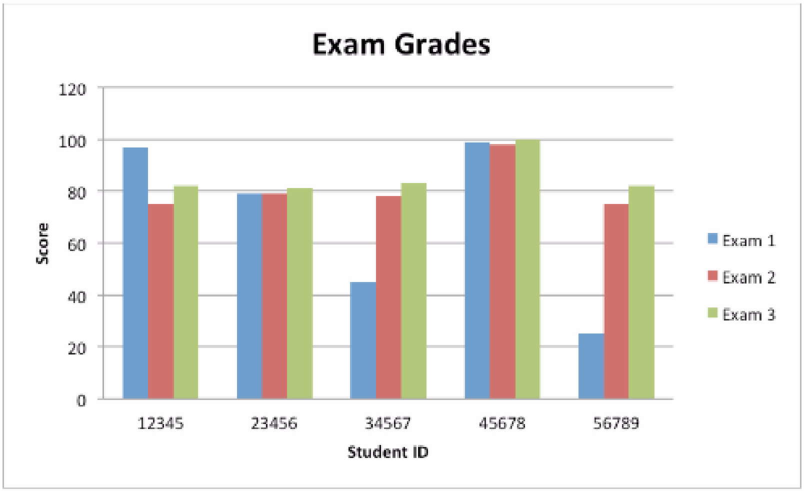
Student ID	Exam 1	Exam 2	Exam 3	Homework
12345	97	75	82	95
23456	79	79	81	90
34567	45	78	83	100
45678	99	98	100	100
56789	25	75	82	70

With a table, the data is organized in clearly defined rows and columns, and the instructor can easily look up the grade that each student received on an individual assignment.

Charts and Graphs

Charts and Graphs are useful when the patterns within the data tell a story. While the information was relatively easy to understand already, we'll use the information from Table 1 as an example. By transferring the numbers for the students' exam scores into Graph 1, it is easy to identify that Student 12345 did better on Exam 1 than he or she did on Exam 2. Students 34567 and 56789, on the other hand, performed much better on Exams 2 and 3 than they did on Exam 1. Students 23456 and 45678, however, performed at approximately the same standard on each exam that they took. These patterns of scores can tell the instructor several pieces of information: Those students who performed consistently likely studied equal amounts for each test, while those who performed better on Exams 2 and 3 than on Exam 1 probably did not study effectively or were having a bad test day for Exam 1.

Graph 1.



As data visualization designers, you are certainly not limited to bar graphs. On the contrary, there are numerous types of graphs and charts that you can use. While Graph 1 was created with Microsoft Word software, there are many alternative software available, including several free resources online. See the list of Additional Sources at the end of this article for some examples of these resources.

General Design Tips

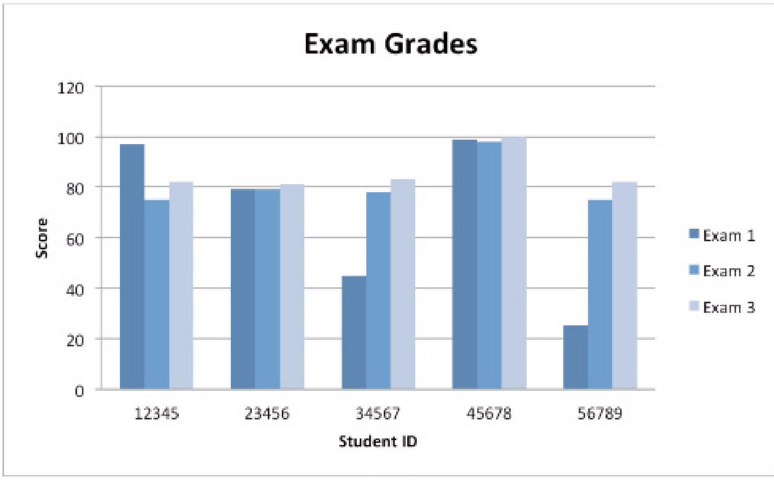
When designing tables, graphs, and charts, it is necessary to remember general design tips as well. For starters, let's consider the CRAP (Contrast, Repetition, Alignment, and Proximity) principles of design.

Contrast

The default colors in most writing programs are black letters on a white background. The stark contrast between white and black make the words easier to read. Consider, however, how difficult it would be to read yellow font on a white background or red font on a maroon background. It's more difficult to read those words; we have to pause or squint in order to read them—if we can read them at all.

When we design data visualizations, we sometimes have to use color to show different categories or to make the image more visually appealing; we don't want to be limited to black lettering with a white background. We do, however, need to maintain that level of contrast with the images we design. Look back at Graph 1; notice that the graph uses blue, red, and green for the bars. These colors differ from each other enough that we can see where one bar ends and the next begins without having to pause or squint. If, however, the bars were all various shades of blue, the data would be more difficult to read. Graph 2 demonstrates this lack of contrast. While the graph is still readable because it has relatively few items, Graph 1 is easier to read quickly.

Graph 2.



Repetition

Repeating ideas and colors provides cohesion. Consider the headings and subheadings you see throughout this textbook. Each article heading is written with the same font type, size, and color. This repeated design allows our brains to understand, each time we see that design, that we are looking at a new article within the same textbook.

To apply the principle of repetition to data visualizations, consider Graph 1 once again. Exam 1 is identified with blue ink for each student, Exam 2 is identified with red ink, and Exam 3 is identified with green ink. The repeated color scheme allows us to quickly associate the exam number and compare that exam across the students. The principle of repetition is especially important if you have multiple visualizations throughout your document. If, for instance, you have three tables in a proposal, you want to demonstrate a sense of cohesion among the tables by using the same font, colors, line width, etc.

Alignment

It is essential to align texts and graphics in a readable manner. Think about the ways in which books and newspapers in the United States are formatted. Generally, text is left aligned or justified; depending on the genre, the beginning of each paragraph may be indented. Because we read from left to right, and our brains are accustomed to seeing text aligned that way, you will rarely will see large amounts of text that are right aligned.

Alignment is perhaps most essential when dealing with tables, especially if you eliminate or reduce the amount of lines you use. In fact, proper use of alignment can save you the ink of having a lot of dividing lines. Align quantitative numbers to the right, thus allowing the ones, tens, etc. digits to align. If numbers are present in non-quantitative forms (like the Student IDs in Tables 1 and 2), they can be left aligned. Most other information should be left aligned.

Proximity

When two images or pieces of information are placed close to each other, we assume them to be connected in some way. If two images or pieces of information are placed further away from each other, we assume that they are not related or are not closely related. For instance, consider the subheading

“Proximity.” There is a space between the last Alignment paragraph and the word Proximity while there is not a space between Proximity and this paragraph. Thus, before we even read the content of the paragraphs, we know that this paragraph belongs with the subheading “Proximity” and not “Alignment,” or another section.

When designing tables, charts, and graphs, it is necessary to place related information close together. For instance, labels for parts of a graph (the Student IDs numbers in Graphs 1 and 2) are placed as close as possible to that particular student’s scores.

How should we refer to the visualizations?

Notice how the tables and graphs were discussed in this article. In order to effectively communicate the information in data visualizations, you need to label the visualizations properly, refer to them in the body of the text, and place them as close as possible to the relevant text. In a sentence or two (or maybe even a paragraph, if necessary) identify the most crucial piece of information you want your audience to get from your visualization. Remember that part of the reason you’re including these visualizations is to reach a wider audience. By pointing out the most relevant information in the text, you can more effectively reach various types of learners.

Grants

Grants are technical documents that appeal for resources such as money, space, and equipment. A proposal serves as a formal appeal to a grantmaking organization, or the organization that offers competitively pursued resources to qualified and exceptional candidates. Most often, proposals are written to pursue monetary resources, but they can serve as requests for any number of needed resources. Proposal writing, at its most basic, is asking for resources.

More than most other technical and professional writing projects, proposal writing has immediate funding opportunities directly attached to the document you're writing. The promise of needed resources can make proposal writing a high stakes endeavor. This means that proven expertise in proposal writing can be a marketable asset. Moreover, the skills successful proposal writers typically possess directly impact their ability to be effective communicators in most facets of professional and technical communication, and in written communication more generally.

Proposal writers can use their skills to support a number of project and goals, including their own, but proposal writers are most often working to secure resources for other people and organizations. Often, proposals are written primarily on behalf of nonprofit and government agencies, but the skills used in proposal writing make for both successful federal grant proposals *and* personal scholarship applications.

Sometimes, organizations have departments or groups that focus on resource development, fund-raising, or grant seeking. Proposal writers may or may not have the title of “grant writer” and may instead be serving in a different capacity at their organization. Volunteers at grassroots organizations can serve as proposal writers, and proposals can even be “ghost written” by consultants with expertise in proposal writing. Regardless of who is doing the writing, a successful grant application typically rests on a number of actions that take place before the organization can submit a final proposal.

Here are some questions successful proposal writers think about as they move through the process of proposal writing:

1. Am I following the guidelines/requirements from the grantmaking agency?
2. Are my organization and the funding organization well-matched (do we have similar goals, advocates, and support)?
3. Have I started a conversation with this potential funder? Is our relationship amicable?
4. Have I proofread?
5. Is my proposal well, and clearly, written?
6. Have I supplied required and relevant information?
7. Does this proposal have a unique voice specific to my organization?

What does this look like in practice, then?

It may seem obvious, but submitted proposals that do not follow *all* required guidelines are typically tossed out. Think of it this way: when a grantmaking organization wants to offer resources, they must craft a document and set of standards for applicants to adhere to. They have, then, done a specific sort of technical and professional writing that demands a specific response, usually from a pre-determined audience. In this way, a funder's well-considered and technically crafted document requires as similarly well-considered and technically crafted response.

It doesn't even matter how excellent your ideas are, or how innovative your organization, proposals that don't follow the rules will not be considered alongside those that do. Following the guidelines means things as basic as submitting by the deadline and making sure you haven't written past the page limit. If you have questions about the guidelines, or you can't find the guidelines, always ask the grantmaking organization. This means that in addition to reading with careful attention and good comprehension, successful proposal writers are typically comfortable with interpersonal communication, making introductions, and networking. This all happens before the actual grant writing even starts.

Once proposal writers have done their homework on the potential funder, are familiar with the project to be implemented, and understand the fiscal management of the funds, they are ready to sit down and write. At this point, the project should come together; proposal writers are required to integrate past, present, and future into one complete and coherent document! This may sound difficult. If it is difficult at the time they begin to write, it usually means the proposal writer doesn't have all the information they need.

If this is the case, they should think about/research the long-term plans for these funds (future). Then, they can also look at how funds and projects (similar ones, if at all possible) have been built and sustained in earlier years (past). Proposal writers then can also write about what is happening now at their organization, and how those initiatives are related to the funds they are requesting (present). In fact, having institutional histories of their organization, as well as detailed plans for upcoming initiatives, helps proposal writers develop a more cohesive and well-developed argument, in most cases.

Tips and Tricks

So, you've determined a need for resources in your organization. What's your next step? Ideally, you'll be communicating regularly with professional societies via listservs, newsletters, and email. Often, calls, or requests for proposals (CFPs or RFPs, colloquially), will pop up in these spaces. You should be sure to keep track of funding organizations that regularly release CFPs. Federal and private organizations typically state their regular funding cycles on their websites. If you are a student, you can often utilize foundation databases through your academic institution.

Once grant seekers identify a funding source, they should communicate with the funder in a meaningful way. Successful proposal writers often start by writing cover letters, if necessary, for certain proposals. They also write technical emails and letters that serve as evidence to the funder that they and their organization are considerate, thoughtful, and serious about the projects they need funded. It doesn't matter the amount of funding, either. Effective proposal writers treat every grantmaking organization, whether they are the Gates Foundation or a local PTA, with recognition that the funding organization has something the proposal writer needs. It may be money, space, technology, or a new playground set, but these are all resources that your organization may need, and with the appropriate proposal, you may receive.

So, considering these resources are something you need, your grant proposal, therefore, will typically be required to do, at minimum, the following:

1. Make a clear and concise request.
2. Indicate why the funder is best suited to support the need.
3. Anticipate questions about how, when, why, where the resources will be used and who will use them.
4. Provide a budget and assessment plan for the project.

Wizened and successful proposal writers talk most about networks, and while it is true that connections can breed funding opportunities, it is important to remember that unsolicited proposals are funded. You have to start somewhere! As you begin to write, remember that funding organizations don't know your organization as well as you. This means you must be cognizant of the jargon and technical narratives specific to your organization. Here are some tips to mitigate and navigate these concerns:

1. Find an outside reader, someone who doesn't know your organization, and who you know will

give you helpful feedback.

2. Break the writing down into chunks. Look at the subsections, or write down expected subsections, for the proposal and write each piece, one at a time.
3. If you can, and are comfortable, delegate sections of the proposal to others in your organization who are more familiar with a specific portion.
4. Be sure to have the head fundraiser and resource developer, your CEO/Executive Director/Director, review the proposal before it goes out.

Finally, remember to continue researching other funding opportunities, even after you submit a final proposal. Once you have the materials gathered and the content developed, you should have a pretty sound understanding of how to approach a different funder with a new request!

WHITE PAPERS

White papers solve problems. They're a kind of proposal that describes an issue faced by an organization or industry and recommends a solution (usually a new technology or procedure). White papers can be for written by people within an organization for their colleagues and superiors, or they can be written for people in other companies. They are shorter than traditional reports, typically less than twenty pages, are easily skimmable, and make extensive use of charts, tables, and diagrams, in addition to text. Ideally, you should be able to get a clear idea of what a white paper is about very quickly. What's the problem? What's the solution? No surprise endings.

Maybe employees at your company have to sit for long hours working at their desks, which makes them uncomfortable and restless. You have an idea about how to help employees exercise and stay more focused on their work, so you write a white paper to your boss proposing that the company should replace some of the regular desk chairs with exercise ball chairs. Your white paper would be focused on the problems caused by sitting all day and how these new chairs would solve those specific problems. You might include diagrams that show how the human body is affected by various chair designs, as well as tables outlining the costs and features of the new exercise ball chairs.

Who reads a white paper?

White papers are written with a specific solution in mind, but have to explain that solution to many different kinds of readers within an organization. Accountants might be interested in the upfront cost of the solution and how much money it might save over time, while engineers might be interested in whether the solution can be practically implemented. To keep the reader's attention, the white paper is focused on solving a particular problem (or a set of related problems) and only provides details that its specific readers will care about.

If you're pitching a new piece of equipment—say, a small robot that will store beverages and pour employees a drink—you would focus on specific features that solve specific problems, rather than spending time laboriously describing all of the things the robot can do or detailing the many moving parts that make the robot work. Your readers don't need to read a detailed operation manual in order to decide if the robot is something they want to know more about. Stick to how your product will help solve their problem. How much time are employees spending on beverage acquisition, and how much time will this robot save across your organization? That information will probably be interesting to most readers because time and money are fairly common concerns. Additionally, if you know some of your readers are wary of an eventual robot uprising, you might include information about how these robots are programmed not to harm humans.

What's in a white paper?

It's important to establish the need for a solution before going into too much the solution itself. This way, your white paper explains to a reader upfront why they're reading it in the first place. White papers often begin with a short summary (called the Executive Summary) that includes an overview of the problem and the most of the important benefits and advantages. For skimmability purposes, a white paper has a specific, descriptive title and includes section headings that tell the reader what information each part of the white paper contains. Sections may include their own introductory summaries as well. Common section headings that may follow the Executive Summary include:

- Background
- Description of the Problem
- Data
- Methods
- Solution (Implementation)
- Conclusion
- Appendices (list of figures, data tables, etc.)
- References
- Index

White papers can draw their information from many sources, including surveys, interviews, testing data, articles, books, and reviews. References to reliable third party sources can help provide credibility. If you were proposing a new chemical-resistant phone to an audience of scientists, you might want to give your readers a sense of how widespread the problem is. You might include a study about how often scientists spill chemical solutions on their phones in the lab. Let's you find a university study finding that the average scientist accidentally dissolves their phone in acid three to four times a year. Now your readers know how common this scenario is, and that the solution you're proposing is probably worth looking into.

White papers also use a lot of visuals, graphs, and figures whenever possible. Not only will this help readers by presenting the information in different forms but it will also provide additional insight into the product or proposed solution.

White papers are designed to be short and easy to read, but they also make the most out of the available space on the page. Your reader's time is precious so descriptive section headers, brief sections, call-outs, and introductory summaries will help the reader determine which sections they want to read, skim, or skip. Visual elements like charts and graphs should be easily understood at a glance. Your readers will thank you for not wasting their time.

Contributors

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