A Rhetorical Approach to Workplace Writing Practices, 2nd ed.

Edited by Cassandra Branham
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- Annotated List of Useful Library Databases
- Annotated List of Useful Online Resources
- Annotated List of Useful Professional and Technical Communication Resources
- Audience Analysis: Primary, Secondary, and Hidden Audiences
- Audiovisual Presentations Made Easy(-ier): Tips for Creating an Effective PowerPoint, Prezi, or Keynote
- Back Matter Components
- Body of Report
- Creating “Viral” Impressions: Composing Infographics for the Classroom and Work Space
- Digital Ethics
- Digital Footprints: Public Writing and Social Identities
- Digital Portfolios
- Diplomacy and Tone Checklist
- Diplomacy, Tone, and Emphasis in Business Writing
- Email Guidelines for Students
- Establishing Your Professional Self: Résumé Writing
- Ethos
- Ethos
- Fallacious Ethos
- Fallacious Kairos
- Fallacious Logos
- Fallacious Pathos
- Front Matter Components
- “GET IT IN WRITING”: New Survey Reveals Paradoxes About Workplace Writers
- Kairos
- LinkedIn: Are You Making the Key Connections?
- Logos
- Memos
- More Advanced, More Daring Résumés
- Pathos
- Practicing Intercultural Communication
- Preparing Job Materials: Job Ads
- Quality Checking Your Résumé
- Researching Your Audience
- Scientific Posters
- Smart Searching
- Taking Control: Managing Your Online Identity for the Job Search
- Tips for Writing Cover Letters
- Understanding Library Resources: Evaluating Systems and Sources
- Understanding URLs
- Usability and User Experience
- Web Search Strategies
- What are New Literacies?
- Why Study Rhetoric? or, What Freestyle Rap Teaches Us About Writing
- Writing Cover Letters
- Writing Processes: Composing
- Writing Processes: Introduction
- Writing Processes: Planning
- You-Centered Business Style
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About this Text

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

- ENC2210 Writing in the Health Science
- ENC3246 Communications for Engineers
- ENC3250 Professional Writing

This is not, however, a typical textbook. Instead of being written by a single author, this textbook is a collection of materials written by various authors. While some of these materials are republished from *Writing Commons*, many of the articles included in the textbook are original articles that were designed with USF’s PTC course curricula in mind. As a result, each chapter consists of multiple, complementary articles on the same topic, rather than presenting one chapter-length, single-authored document. Our hope is that this format will allow instructors to easily choose readings that fit the needs of their individual classes, while also allowing students to easily locate material that will be useful for their course-related projects. While in some cases, an instructor might choose to assign an entire chapter, in other cases, an instructor might only assign one or two articles from a chapter, depending on the needs of the students in the course.

Although this textbook was designed with several specific courses in mind, we hope that we have provided students with a resource that will prove useful outside the scope of the classroom as well. Chapters have been designed to address various components of professional and technical communication, and many of the concepts presented intersect with content from surrounding chapters. The following chapter overview provides a brief outline to familiarize you with the general content of each chapter.

Chapter Overview

Chapter 1, “Analyzing the Rhetorical Situation in Workplace Writing,” discusses the importance of analyzing the writing situation in order to produce documents that are rhetorically effective for the intended audience. In addition to discussing the ways in which the rhetorical situation can be analyzed for workplace writing, this chapter also presents material on audience analysis and rhetorical appeals.
Chapter 2, “Professional and Technical Writing Processes,” examines the writing process from the standpoint of workplace writing, and includes information on planning, composing, revising, and editing professional documents.

Chapter 3, “Employment Materials,” presents information on designing resumes, cover letters, CVs, and web presences.

Chapter 4, “Digital Literacies,” examines the importance of digital literacies for professional and technical communicators.

Chapter 5, “Ethical Communication,” introduces the reader to the importance of ethics and ethos in professional and technical communication. This chapter also introduces the reader to the topic of intercultural communication.

Chapter 6, “Document Design and Data Visualization,” introduces the reader to the basics of document and web design. This chapter also includes information about data visualizations and the creation of scientific posters.

Chapter 7, “Style in Professional and Technical Communication,” discusses the use of a you-centered style when composing professional documents. Additionally, this chapter covers the topics of diplomacy and tone.

Chapter 8, “Research Methodologies in Professional and Technical Communication,” begins with an introduction to research and information literacy. This chapter includes information on a variety of research strategies and tools, discusses strategies for determining how to best visualize data, and also covers usability testing.

Chapter 9, “Common Genres,” presents genre-specific information for the following genres common to professional and technical communication: memos, press releases, grant proposals, formal reports, and audiovisual presentations.
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Workplace Writing and the Rhetorical Situation

By Julie Staggers, University of South Florida

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<td>• Compose professional/workplace documents and oral presentations for multiple audiences and specific purposes using appropriate technologies</td>
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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 (1998). 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. She 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. Remember, 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 reading. Later in this chapter 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 language -- or some other 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.

You can see the video Shepard made to explain it all on YouTube: http://youtu.be/6qI-U1VnCal

Notes
• Shepard uses the terms "discourse," which for our purposes means language/action/communication. Also, in this chapter, we use "occasion" instead of "exigence" (because exigence is hard to remember and harder to say), but for our purposes, they mean the same thing.
• Watch out! The soundtrack on this video is loud.

Both oral and written communication are rhetorical. In the workplace, you'll find yourself in a rhetorical situation whenever you encounter a need to communicate with other people in order to effect change or achieve a desired outcome. The need might be simple and interpersonal: You would like to go to lunch, so you leave a pink sticky note on your cubicle neighbor's computer screen with the word "Lunch?" scribbled on it. In this instance, the need to communicate is strictly personal, you know your audience well, and the communication is one-to-one via a handwritten note. However, rhetorical situations can be quite complex:

• 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

Regardless of scope or complexity, every rhetorical situation includes three components:

1. An occasion: The "need" -- 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 language to shape the opinions, decision-making, or actions of an audience. An occasion is only rhetorical if it can be change 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. A set of constraints: The set of factors that limit options for communicating, which include a) constraints the rhetor brings to the situation, and b) constraints associated with the situation itself.

A Rhetorical Approach to Workplace Writing Practices

Chapter 1: Analyzing the Rhetorical Situation in Workplace Writing
The Case of the Pink Sticky Note illustrates the way rhetorical situations operate in the workplace. First, 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.

Discussion Questions
1. Is it important to understand the rhetorical situation? Why or why not? Can you offer an example from your own experience when thinking about the rhetorical situation helped you? Or a time when not considering the rhetorical situation worked against you?
2. Not everything is rhetorical. Death is not rhetorical. Natural disasters are not rhetorical. Why not?
3. What is the rhetorical situation faced by the physical therapist in the Physical Therapy scenario in this chapter? (Occasion? Audience? Constraints the therapist brings with her? Constraints the situation itself imposes?) How might the therapist use her understanding of that scenario to respond appropriately to her patient?

Exercises
1. Consider a communication task that you have or will face this week. Describe the rhetorical situation for this task.
2. FSU student Morgan Shepard used the analogy of football to explain the concept of rhetorical situation for a novice audience. Identify a target audience and write your own analogy to explain the rhetorical situation to that audience.
3. You’d like to borrow $500 for a tattoo. You’ll be able to pay the loan back next week when you get paid, but the tattoo artist of your dreams is leaving town this Friday. You can ask your best friend or ask your parents. Compare and contrast the rhetorical situation for both scenarios, then decide who you will ask first.

References
Analyzing Writing Situations in the Workplace

By Julie Staggers, University of South Florida

Learning Objectives

- Compose professional/workplace documents and oral presentations for multiple audiences and specific purposes using appropriate technologies
- Apply/adapt professional writing conventions, including genre, tone, and style for particular writing situations

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 rhetorical situation.

You probably wouldn't have to think much about your rhetorical situation before you scribbled a message on a sticky note to invite a colleague to lunch. The various components of the situation — the occasion, audience, and constraints — are likely so familiar to you that you don't even give them a second thought. In addition, the stakes for such a writing task are low. If your message misses its mark in some way, the worst thing that will happen is that you'll have to eat lunch alone at your desk.

When the stakes are higher, or when you're on less familiar footing, the most important thing you can do before you begin a writing task at work is to analyze your writing situation. Such analysis will help you develop a better understanding of your writing task at the planning stage, before you've started to write anything.

Any analysis of your writing situation begins with a check of your understanding of the rhetorical situation:

- Do you understand the occasion that motivates this communication?
- Are you already familiar with the audience(s)?
- How familiar are you with the constraints on this communication?

Once you have a firm grasp on occasion, audience, and constraints, you can begin to analyze the other elements of the writing situation: purpose, author, and text.

If you're new on the job, analyzing the writing situation even for small, low-stakes writing tasks can help you develop a deeper understanding of the role writing plays in your new workplace. It will also help you understand workplace culture and ethics so you can respond appropriately to workplace situations in writing and in speech.

When you're a more experienced writer, you may perform an almost subconscious analysis of the writing situation for routine writing tasks. For writing tasks that are unfamiliar, large-scale, high stakes or that involve collaborators, even very experienced writers will benefit from doing formal analysis of the writing situation during the planning stages of a task or project.

Analyzing your writing situation is an important part of the pre-writing stage of the writing process. Whether you're working on an individual assignment or planning a big project with a team of collaborators, you can use the following list of questions to help you think about ways to approach the job.

Thinking about the writing situation before you start writing
- helps you think more strategically about your communication task
- saves you time and improves efficiency
- usually results in deliverables that are more rhetorically effective

Questions to Consider

Use the list of questions below as a guide for analyzing your writing situation. 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 does my audience need in order to understand my message?" Audience is the single largest shaper of the texts you will produce. Your understanding of your audience(s) 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 pattern is most effective, and what delivery medium and format are most appropriate. Many documents will have more than one audience. (See “Audience Analysis: Primary, Secondary, and Hidden Audiences” for a more detailed discussion of audience issues.)

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 audiences?
   • Are you writing for an individual or a group?
   • Do you know your audience personally? What is your organizational relationship to him/her/them? Are you a superior? subordinate? peer? insider? outsider?
   • What assumptions can you make about this audience?

2. What type of audience is this?
   • Experts may be concerned with increasing their own knowledge or evaluating validity (of documents, projects, proposals)
   • Managers may be concerned with decision-making or getting up-to-speed
   • Technicians may be concerned with the nuts-and-bolts
   • Lay people may lack familiarity with the subject matter

3. How much knowledge or technical expertise does the audience possess on this particular subject?
   • Experts/peers require less explanation
   • Novices or laypeople require more explanation
   • Highly technical readers benefit from specialized language or jargon
   • Low technicality readers may be confused by specialized language or jargon

4. What biases or preconceptions does the audience bring to this text?
   • How will those biases influence readers’ reception of the text?
   • Are they likely to be resistant to the content of the text?
   • Will they be more likely to agree/disagree with the information in this text?

5. What cultural considerations might you need to address to accommodate the primary audience?
   • Will the document be read by an international audience?
   • Do you need to adjust the content to accommodate a global audience?

6. Do you need to adjust language or rhetorical strategies in order to meet the needs of this audience?
   • 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 itself 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?
   • What environment are you writing in?
   • What tools/technology do you have available?
   • How much time do you have?
   • 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 audience face when they are interacting with the text?
   • What environment will they be reading/using your document in?
   • How will they access/receive your text, and will they need specific technologies?
   • Will the text have their full attention or will they be distracted?
   • Will they be limited by lack of time, space, access or resources?

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?
   • What is the organization’s structural hierarchy?
   • 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?
   • If the communication is intended to be private, is there a chance that it might be intercepted by an unintended audience?

6. What cultural, political, ethical or other factors place constraints on this project?

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
• Effecting positive action
For any given text, you may have purposes as the actual author that are different from the purposes of your organization. For instance, if you have to deliver bad news to an important client, your organization's purpose might be to inform the client without damaging the relationship between companies; you may want to inform the client, maintain a good relationship between companies and impress your boss with your problem-solving skills.

In addition, audience(s) will receive your text with their own purposes in mind.

Common purposes include:

- To inform
- To instruct
- To persuade
- To describe
- To document
- To educate
- To recommend or advise
- To warn
- To indemnify
- 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 option

Some questions to ask about purpose:

1. 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?
2. From your perspective, what is the main purpose of the document? Secondary purpose? Other purposes?
3. What is the audience's goal or objective for this text?
4. How will the audience use or interact with this text?
5. What kind of information or content does the audience expect to find in this text?

Writer

In workplace texts, you must adopt a persona, or ethos, that appropriately reflects your relationship with the audience, given the specific purpose of the communication. Workplace texts have both an actual or "real" writer and a writer's persona that appears in the text. As the "real" 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, the "real" writer(s) must decide what persona to adopt within the text. Audience and purpose should guide this decision.

1. What is your relationship to the primary audience?
2. How do you 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 language choices are most appropriate?
   - What degree of formality is appropriate?
   - Will jargon and specialized language aid or hinder understanding?
   - What voice is most appropriate? First-person/second-person (I/you) or third person (they/it)?
5. Do you need to adjust your message because of political or ethical considerations?
   - Does the message have a negative or positive impact on others?
   - 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
- delivery

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 rhetorical situations. Consequently, while proposals are a recognized genre, the proposal genre in one workplace may have somewhat different expectations than the same genre in another workplace. A medium is a means of communication. The medium might be oral, print, 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?
   - 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?

Discussion Questions

1. How might an analysis of the writing situation be useful to members of a team working on a large project?
2. How would you tailor content and language for an expert reader? a lay reader? How could you meet the needs of both types of readers in the same document?
3. How might a writer's beliefs and attitudes or broader cultural, political or ethical factors


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place constraints on your writing situation?

4. If you wanted to establish your persona as friendly, professional, and knowledgeable in a proposal to your boss, what strategies would you use?

5. How might audience, purpose, and constraints influence the decision you make when designing a poster for the local zoo's annual overnight campout for kids? The target audience might be parents.

Exercises

1. Consider a writing situation that you have or will face this week. It can be something as common as an email or Facebook post or something more complex. Analyze the elements of this writing situation.

2. Find at least three examples of professional or technical writing and identify all of the purposes you can see in each example.

3. Imagine that you have to give two speeches about e-cigarettes — on to high school students and one to a parent's group. Analyze the writing situation for each scenario.

4. Analyze the writing situation for your next class project, and write a memo to your instructor that describes your analysis. You will have to make decisions about which content to include in the memo—not all of the information you gather during your analysis will be useful as you write your memo (for example, some information about your writing situation may not be necessary until you begin drafting the project).
Audience Analysis: Primary, Secondary, and Hidden Audiences

By Deedra Wollert Hickman, University of South Florida

<table>
<thead>
<tr>
<th>Learning Objectives</th>
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<tr>
<td>• Compose professional/workplace documents and oral presentations for multiple audiences and specific purposes using appropriate technologies.</td>
</tr>
<tr>
<td>• Recognize ethical, legal and cultural issues in business and the professions.</td>
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A crucial part of writing technical documents is to consider the needs and level of knowledge or expertise of your audience. Inaccurately making assumptions regarding audience creates failure in technical writing, not only in design, but for ethically and culturally aware content. For simple, routine messages, it is not necessary to analyze your audience in depth. However, for complex or highly technical messages, taking the time to analyze the needs and knowledge base of your audience will increase the likelihood of a successful transmission.

Analyzing Your Audience’s Needs

Here are some key questions to ask when determining the readers’ needs during your preparation:

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?

As a writer, your most important responsibility is determining who makes up your audience. You should continue to analyze your audience throughout the composing process. You can build a legitimately accurate representation of your audience by asking yourself key questions before and while you write. See Table 1 for more examples of these questions.
At some point, you have probably received instructions on how to complete a task or put something together and have been left wondering what exactly you are supposed to do. You know it’s in English, but it just doesn’t make sense. Professional writers can adapt instructions written by technical experts to be comprehended by a general audience. Many products purchased today require some sort of assembly. You can easily identify which companies have invested money in hiring skilled professional writers by how effortless the instructions are to follow.

Table 1. Audience Analysis

<table>
<thead>
<tr>
<th>Analyze</th>
<th>Who is/are the recipient(s)?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Understand</td>
<td>What is their knowledge of your message?</td>
</tr>
<tr>
<td>Demographics</td>
<td>What is their age, gender, education level, position?</td>
</tr>
<tr>
<td>Interest</td>
<td>What are their interests or investment to your message?</td>
</tr>
<tr>
<td>Environment</td>
<td>What is your relationship to the audience? What is their likely attitude to your message? Have you taken cultural differences into consideration?</td>
</tr>
<tr>
<td>Needs</td>
<td>What information does your audience need?</td>
</tr>
<tr>
<td>Customize</td>
<td>How do you adjust your message to your audience?</td>
</tr>
<tr>
<td>Expectations</td>
<td>What is your audience’s expectations?</td>
</tr>
</tbody>
</table>

Once you identify your audience, decide how to get the best results from your communication by determining your audience’s knowledge, ability, and interests. See course specific suggestions and Figure 1 to see how a specific audience compares to a more generalized one.

ENC 2210 – Technical Writing for the Health Sciences

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.

ENC 3246 – Communications for Engineers

As an engineer, you will likely need to communicate with several different audiences - possibly all in one document. For example, should you draft a technical report on your latest project, the company president will be more interested in the executive summary and the financial reporting, whereas fellow experts will be more interested in the technical details of the project, which you can easily communicate to them using charts, mathematical expressions, and technical terms. 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.

ENC 3250 – Professional Writing

At some point, you have probably received instructions on how to complete a task or put something together and have been left wondering what exactly you are supposed to do. You know it’s in English, but it just doesn’t make sense. Professional writers can adapt instructions written by technical experts to be comprehended by a general audience. Many products purchased today require some sort of assembly. You can easily identify which companies have invested money in hiring skilled professional writers by how effortless the instructions are to follow.

Figure 1. Audience Comparison

Are your readers knowledgeable or do they have the same background and familiarity with the subject as you, 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 all terms 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 on 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.

Primary, Secondary, and Hidden Audiences

Primary audiences are those who receive the communication directly and are also known as the target audience. 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. Figure 2 shows an example of both a primary and secondary audience. This typical business memo is being directly sent to Stan Jobs, who is the main, or primary, audience. Linda Smith, the sender,
has also decided to send George Jones a copy of this message, as shown on the CC line of the memo.

![Memo](image)

Figure 2. Memo

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. Looking at that same memo, let’s say that it is standard practice at the Green Bean Company to post all new policies in a common area. All employees and those who see the posted memo would be considered a hidden audience. They aren’t specifically mentioned in the memo heading, but knowing that the document will be posted, Linda would be sure to use language that would be understood by that hidden audience as well. It is also good practice to make sure all documents are professionally written and exclude all biased language, as these files could be subpoenaed as evidence to support claims such as employee grievances.

**Using Bias-Free Language**

Technology has not only made our lives easier but it has bridged 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 both unbiased and sensitive. Use caution with expressions that could be biased in terms of gender, race, ethnicity, age, and disability. Avoid use of idioms and phrases, as they are often confusing or offensive in other cultures.

### Table 2. Biased versus non-biased statements

<table>
<thead>
<tr>
<th>Type</th>
<th>Bias Statement</th>
<th>Bias-Free Statement</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gender</td>
<td><em>Please call our office girl to schedule your next appointment.</em></td>
<td><em>Please call our receptionist to schedule your next appointment.</em></td>
</tr>
<tr>
<td>Race or Ethnicity</td>
<td><em>Five Orientals applied for the job we advertised.</em></td>
<td><em>There were five Asian applicants for the advertised position.</em></td>
</tr>
<tr>
<td>Age</td>
<td><em>This form applies to the elderly only.</em></td>
<td><em>This form is applicable for ages 65 and over.</em></td>
</tr>
<tr>
<td>Disability</td>
<td><em>Mr. Jones is confined to a wheelchair.</em></td>
<td><em>Mr. Jones uses a wheelchair.</em></td>
</tr>
</tbody>
</table>

### Resources

To learn more about Audience Analysis, check out these resources on line:

- **Language Portal of Canada: Non-Sexist Guidelines**

- **Audience Analysis - Just Who Are These Guys?**
  - Online textbook
    [https://www.prismnet.com/~hcxres/textbook/aud.html](https://www.prismnet.com/~hcxres/textbook/aud.html)
  - Helpful planner for determining your audience
    [https://www.prismnet.com/~hcxres/itcm/planners/aud_plan.html](https://www.prismnet.com/~hcxres/itcm/planners/aud_plan.html)

- **Brief Presentation on Audience Analysis**
  [http://markbiz.files.wordpress.com/2008/02/6-audience-analysis.pdf](http://markbiz.files.wordpress.com/2008/02/6-audience-analysis.pdf)

- **Bias-Free Language Guide**

### Exercises

1. Imagine that you work for a nation-wide medical supply company. It has recently come to your attention that an account has been mishandled by someone in another department, and you need to notify your immediate supervisor. The person responsible for mishandling the account is well-liked within the company, but in your experience, often shirks her responsibilities. You are planning to provide this information to your supervisor via email, but you know that there is a possibility that you email might be forwarded to others within the company. Your immediate supervisor is your primary audience, but who are the secondary and hidden audiences of this message? How will you understanding of these audiences affect the way in which you craft your message?

2. Consider your next writing task in this course. Who is the primary audience of this document? With this audience in mind, answer the questions found in Table 1: Audience Analysis (above). Then, identify your secondary and hidden audiences. Do the needs of these audiences change your answers to any of the questions?
Why Study Rhetoric? or, What Freestyle Rap Teaches Us about Writing

By Kyle D. Stedman, Rockford University

The website eHow has a page on "How to Freestyle Rap" ("Difficulty: Moderately Challenging"), and I'm trying to figure out what I think about it. On one hand, it seems like it would be against the ethos of an authentic rapper to use a page like this to brush up on freestyle skills. After all, the page is hosted on a corporate website owned by Demand Media, Inc., the same people behind, among other things, a golf site.

But on the other hand, the advice seems solid. The eHow page encourages me to follow an easy, seven-step model:

1. Learn the basics.
2. Just start flowing.
3. Write down some good rhymes ahead of time.
4. Work on your wordplay.
5. Practice at home in your spare time.
6. Have a rap battle.
7. Rap what you know.


The page treats freestyling as an art that can be practiced effectively by anyone, as long as the rapper is willing to research, take risks, spend time developing the craft, practice with a community and for an audience, and stay true to him/herself—i.e., to keep it real.

And here's the thing: I think rhetoric is the same way. That is, it's an art that can be practiced effectively by anyone, as long as the rhetor (the person who is communicating rhetorically) is willing to research, take risks, spend time developing the craft, practice with a community and for an audience, and stay true to him/herself.

You don't hear me though.

That's right; rhetoric is an art. But not necessarily the way we think of it. The ancient Greeks called rhetoric a *techne*, a word they used to mean "a craft or ability to do something, a creative skill; this can be physical or mental, positive or negative, like that of metalworking or trickery" (Papillion, 1995, p. 149). Other examples of *techne*? Ship-building, for one. You'd better not muddle your way through the art of building a ship, or you'll ruddy well sink. Rhetoric developed as an oral art, the art of knowing how to give an effective speech—say, in a court, in a law-making session, or at a funeral speech. And if you muddled your way through a speech, not convincing anyone, not moving anyone, looking like a general schmuck in a toga, you'd ruddy well sink there, too.

So rhetoric is an art. But of what? The shortest answer: it's an art of communication, whether written, spoken, painted, streamed, or whatever.

But how do you judge when communication has worked, when it's effective? In other words, how do you know when someone has used rhetorical skills well?

That's easy: when an *audience* says it's effective. So:

- An anchor on a conservative news show makes a jab at President Obama. Conservative watchers thought the jab was well-deserved and well-timed; it was rhetorically effective for them. Liberal watchers thought it was a cheap shot; it wasn't rhetorically effective for them.
- A student writes an essay arguing that advertisements are so pervasive in the U.S. that he can't even go to the bathroom without seeing Coke's logo. His roommate reads it and doesn't think advertising is a big deal; he's not convinced, so it's not a rhetorically effective essay for him. But his teacher reads it and thinks it's cleverly argued and bitingly true. It works for her; it's rhetorically effective for her.
- Eminem ends a rap battle to raucous applause from the people in the room, but the old grandmother in the back of the club thinks it was all a lot of noise. To her, Eminem's rapping wasn't rhetorically effective.

So rhetoric can't be judged completely objectively. It wouldn't make sense to say that someone's rhetoric was "right" or "wrong" (though it can be "better" or "worse" for specific audiences). It all comes down to the audience.

Also, notice that all of those examples describe situations where the rhetor is being persuasive in one way or another. That's a common definition of rhetoric—that it's the art of *persuasion*. And persuasion is important—we're constantly trying to convince people, either subtly or overtly, to understand our points of view, and people are constantly trying to convince us of their points of view.

But I like to think of rhetoric as being about more than just persuasion, which starts to sound all bossy and manipulative when I think of that way. Instead, I think rhetoric is the art of making a connection with an audience. It's a series of techniques to help me share the way I see things with someone else. And depending on who I'm sharing with, I'll use different techniques. I wouldn't communicate my views to my wife in the same way that I would to the U.S. president, or to Jay-Z.

The best rappers are surprising. You lean over laughing at wordplay that you didn't expect. You 1 Thanks to Dr. Debra Jacobs for pointing this out to me.
smile, get into the groove, listen more carefully, and later you remember how much you enjoyed it. The communication was effective.

I read *Zen and the Art of Motorcycle Maintenance* in my senior year of high school, but I didn’t really get it. The author kept talking about rhetoric, and even after I looked up the definition, it didn’t make any sense to me. Looking back, I think that’s ironic: the beating, blood-pumping heart of rhetoric is a consideration of audience. Speaking or writing or composing something that works the way you want it to for the audience you want it to work for.

But I don’t think senior-year me was the intended audience of *Zen*. If I had been, the author was pretty lousy at being rhetorical, because he didn’t explain well enough what rhetoric even means. The concepts he wanted his audience to be convinced of after reading his book didn’t leave me convinced and riveted; instead, I was glassy-eyed and dreaming about angsty 90s rock.

He was thoroughly un-rhetorical in his discussion of rhetoric.

I read the book now and I’m moved and touched. He shared his views effectively with me. Without the text changing at all, I became his audience. I get it now.

So he was being rhetorical after all. It’s both.

Why study rhetoric? It’s the same as if you asked, “Why study freestyle rap?” Both are a set of skills and techniques that often come naturally, but which people can learn to do better by studying the methods that have proven effective in the past.

“Why study painting?” Because by studying how other people paint, you learn new techniques that make you a more effective painter.

“Why study business?” Because by studying how other people do business, you learn new techniques that make you a more effective businessperson.

Why study ship-building, or basket-weaving, or trickery, or anything else that you might be able to muddle through but which you’d be better at with some training and practice? Isn’t it obvious?

Within the realm of communication, the same theory applies to rhetoric. Why not learn some techniques that will increase the chance that your audience will think/feel/believe the way you want them to after hearing/reading/experiencing whatever it is that you’re throwing at them? And that’s only thinking about you in the com-

poser’s role. What about when you’re in the receiving end, hearing/reading/experiencing things that have been carefully crafted so that you’ll buy into them? A scary list of rhetorically effective people: politicians, advertisers, super-villains. (You want rhetoric? Just listen to the slimy words of the Emperor in *Return of the Jedi* or the words Voldemort beams into everyone’s brain in *Harry Potter and the Deathly Hallows, Part Two.*) Studying rhetoric has the uncanny effect of opening your eyes to when people are trying to be all rhetorical on you, wielding their communication skills like an evil weapon.

My friend to me, the other day: “Ugh. Carrie just wrote something inappropriate on her fiancé’s Facebook wall again.”

Me: “What’d she say?”

My friend: “I don’t even remember. It was something all gushy and uncomfortable. I skimmed back a bit and saw she’s been doing that a lot. Doesn’t she know that she can write messages that go just to him and not the rest of us? She doesn’t have to post that stuff on his wall!”

As I thought about this conversation, I realized that Carrie (not her real name) was in some ways being a rhetorical failure. Yes, her fiancée (one person), who was certainly the primary intended recipient of her message, probably found the wall post very rhetorically effective. That is, he surely felt the gushy emotions that she meant for him to feel. Her message worked. How rhetorical!

But because a Facebook wall is to some extent public, there are others who will read her post too (hundreds of people). What is the intended message for them? If we trust and like Carrie (and if she’s lucky), then we may think, “Oh, it’s sweet when people are public about their love for each other!” If we’re kind of sick of Carrie, we might think, “She just plain doesn’t get that we don’t care about her digital smooches and hugs.” And if we’re mad at her, we might think, “She’s publicly declaring her love to him because she wants us to feel bad that we don’t have the kind of true love that she has!”

In short, after reading the message, most of us would thing either A) “That’s nice!” B) “Oh, gross,” or C) “That hussy!”

Why study rhetoric? Because, communication is difficult, and even more difficult when we are not rhetorically aware.

We’re still beating around the bush when it comes to what rhetorical skills actually look like. Up to this point, you could say, “You need to be able to write in this way and in this form.” But I have, at this point, not been able to write in this way and in this form. So let’s step back a bit and see if we can figure out what rhetorical skills actually look like.

Mic passed. Among lots of other things, some of the skills practiced by rhetors include:

- The basics (e.g., how to determine the best time and place to communicate, how to clarify what a communication is about, how to learn about an audience)
• How to choose appropriate ideas and evidence to use for a given audience (e.g., freewriting, open-minded research, other forms of what we call "invention")
• How to organize material presented to a given audience (e.g., a business report, a classical six-part speech, a thesis-driven research essay)
• How to shape the style of a message or argument in ways that will be both understandable and exciting for an audience (e.g., using rhetorical figures to liven up your sentences, varying sentence length and type)
• What medium to use when communicating to a given audience (e.g., a speech, an essay, a video, a recording, a painting, a sticky note, a letter made from words cut out of a magazine)

Yes, I keep writing the word audience over and over. That's because it's the core of any rhetorical endeavor. Remember? All of the considerations described above can be summed up in one sentence: thinking rhetorically means thinking about your audience. And that means communicating in a way that doesn’t make you look stupid, mean, or confusing. And that means you should communicate in a way that makes you look smart, nice, and clear.

It sounds obvious, right? I think so too. But then, why are people so bad at it?

The failures of a failed rhetor are those of a failed freestyle rapper, too. He gets up to start a rap battle and seems impressive at first (i.e. he has a strong ethos—a word we use a lot when analyzing communication from a rhetorical angle), but then things go badly when he gets the mic. He starts out blundering around, looking like he's never done this before. (He should have followed eHow's advice to "Write down some good rhymes ahead of time.")

In desperation, he lashes out at the other guy with attacks that seem like low blows, even for a rap battle. The audience groans; he broke an unspoken rule about how mean to be. Rhetorical failure. He can tell that he's losing the audience, so he changes his tactics and starts blending together all kinds of words that rhyme. But he fails at this too, since nothing he says makes any sense.

Eventually, he's booed off the stage.

Why study rhetoric? So you can succeed in rap battles. I thought that was obvious.

Exercises

1. Some of the most obvious examples of effective rhetoric can be seen/read in our favorite pieces of literature and film. In the article above, Lord Voldemort from the Harry Potter series and the Emperor from the Star Wars films are given as examples of powerful rhetoric. Now, think about some of your favorite books and films. Identify a character who you believe was exceptionally rhetorically effective, and describe how this character used effective rhetoric to accomplish his or her goals.

2. Audience is one of the primary considerations for a rhetor who wishes to be rhetorically effective. The author mentions that while his teenage self was not the article for Zen, his adult self appreciated the text much more. In this case, the author's teenage self did not immediately recognize that he was not the text's intended audience. Translating this situation to the context of professional and technical situation, what types of information might you include on documents to help ensure that the intended audience of your document is clear? In other words, how does a reader of a professional or technical document know that the document is intended for him/her? (Think of various genres in PTC.)
The Rhetorical Appeals

By Cassandra Branham, University of South Florida

<table>
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<tr>
<th>Learning Objectives</th>
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<tbody>
<tr>
<td>Compose professional/workplace documents and oral presentations for multiple audiences and specific purposes using appropriate technologies</td>
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If you've taken freshman composition, you're probably familiar with the rhetorical appeals: ethos, pathos, logos, and kairos. The following pages will offer you a detailed refresher on each of these terms. First, however, you might be wondering: what do the rhetorical appeals have to do with professional and technical communication?

The answer is: a lot. While it might seem that, because of the straightforward nature of technical and professional communication, the rhetorical appeals aren't being used, they are, albeit in varying degrees depending on the document. Let's take a brief look at how each of the rhetorical appeals might be used in professional or technical communication.

**Ethos**, or the appeal to credibility, is certainly important in technical and professional communication, as the audience needs to trust the source of the information they are receiving. Think of a user manual or a troubleshooting guide, for example. If the user does not trust the information included in such a manual, he or she may ignore important information included in the guide, such as safety information. For the user to trust the manual, he or she must have faith that the author of the manual is an expert on the subject at hand. However, because technical and professional communication is not often attributed to a single author, but rather to an organization, the ethos of the organization is at stake as well. Not only does the audience need to trust the organization in order to trust the message, errors in the message might negatively impact the company’s ethos, as well as your individual ethos as a professional communicator.

**Pathos**, or the appeal to emotion, might seem like it doesn’t have a place in technical and professional communication and, in some documents, it does not. However, there are certain scenarios in which technical and professional communicators might use pathos to support their argument—for example, in cases of arguing for policy change. If a professional communicator can prove that an existing policy is, for instance, resulting in avoidable bodily harm to individuals, including the stories of these individuals in an argument for policy revision would be an effective use of pathos.

**Logos**, or the appeal to logic, often makes up the bulk of professional and technical documents, and these documents are primarily intended to provide information. Logos appears in technical and professional documents in the form of statistics, cited research, and other relevant examples or evidence.

**Kairos**, or the appeal to timeliness, is often important in many professional and technical documents. Proposals, for instance, deal heavily with kairos. Not only is it important for an author to submit his or her proposal at an opportune moment, when the decision maker is in a position to grant the author what he or she is asking for (be it funds, resources for a new project, etc.), proposals must also include a convincing timeline. Thus, not only is the submission of a proposal a kairotic moment, it is important to demonstrate that the proposed project can be completed in a timely fashion.

Now that you are familiar with how the rhetorical appeals are used in professional and technical communication, you will begin to notice how the rhetorical appeals influence the audience’s understanding of and reception of professional and technical documents. When you are tasked with composing professional and technical documents in your courses or in the workplace, take some time to examine some sample documents to see how they use the rhetorical appeals to accomplish their intended purposes. The following pages will present additional information about the rhetorical appeals in greater detail and, as you read these articles, think about how you might use these rhetorical appeals as you create your own technical and professional documents.
Ethos
By Megan McIntyre, University of South Florida

<table>
<thead>
<tr>
<th>Learning Objective</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Apply/adapt professional writing conventions, including genre, tone, and style for particular writing situations</td>
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There's certainly a law that governs what must be said at the end of a political advertisement, or else President Obama wouldn't say exactly the same thing as every other politician at the end of an ad, but there's also an element of persuasion at work here. By appearing on camera saying that he approves the content, the President is giving the ad credibility. It's about him, his work, and his beliefs, and by saying he has approved the ad, President Obama is saying, "You can trust this information about me."

This appeal to credibility is known as "ethos." Ethos is a method of persuasion in which the speaker or writer (the "rhetor") attempts to persuade the audience by demonstrating his own credibility or authority. I think the best way to understand this kind of appeal to the credibility of the author is to look at the three most common ways a rhetor attempts to demonstrate authority on a topic.

### Intrinsic Authority

Intrinsic authority is authority that comes from the rhetor herself. It might come from her work experiences or college degrees or generally good morality, or it might come from how well she demonstrates that she can speak or write about her topic.

Aristotle, who coined the term "ethos," said that "persuasion is achieved by the speaker's personal character when the speech is spoken as to make us think him credible." This is true, he said, because an audience will "believe good men more fully and more readily than others." For Aristotle, though, this kind of persuasion shouldn't derive from who the person is exactly; rather, it "should be achieved by what the speaker says, not by what people think of his character before he begins to speak." For us, however, in an age where Google is a click away, the speaker's character and achievements have an impact on the way we think about what she says. It's unavoidable. But the person's ability to speak authoritatively on her topic is just as important.

Remember, though, that a rhetorical situation, in which as speaker or writer seeks to purposefully persuade her audience, is an artificial situation: an author shares on part of herself with the audience. To put it another way, as M. Jimmie Killingsworth, a scholar of rhetoric from Texas A&M University, does in a 2005 article in *Rhetoric Review*: "The author's position is not simply a personal account of himself or herself. The author is a complex individual who selectively reveals (or invents) aspects of character pertinent to the rhetorical work required at the moment" (251-52).

### Borrowed Credibility

Sometimes, though, a speaker or writer doesn't have enough of her own credibility to convince the audience. What should she do then? Well, this is usually when a rhetor borrows credibility from somebody else. That's one of the reasons it's important to know how to cite credible sources. The sources we use when we write give us some of their credibility. As the Yale University Writing Center encourages students, "Incorporating other people's ideas into your writing allows you to stand on their shoulders as you explore your topic."

Think, for example, about the way we quoted Aristotle earlier in this discussion. We're teachers, so we have some authority. You're reading this information in a textbook, and that also gives us some credibility, but those two things combined might not be enough to convince you that we are authorities on the subject. So, we borrowed credibility from the man who first wrote about ethos. I used quotes from Aristotle's most important book on rhetoric, and those quotes help establish my own credibility on the subject at hand.

### "Oh, That Makes Sense"

There is also, however, the credibility that comes from saying or writing something that the audience already believes or that reinforces that audience's experiences. We should treat this kind of ethos with a healthy dose of suspicion. Just because something sounds right to you or makes you feel good about what you believe does not mean that it is true.

Take, for example, the idea that the Founding Fathers of the United States were Christians. Many well-known commentators and politicians have make this claim, and it has been generally accepted as the truth. The statement has the authority that comes from being the conventional wisdom. The problem, however, is that the Founding Fathers weren't all Christians. Some of the most prominent members of this group, including Thomas Jefferson and Benjamin Franklin, were actually Deists. They didn't believe that Jesus was God, which is a central tenant of Christianity, and wrote extensively about their Deism. (Refer to Benjamin Franklin: Autobiography, Poor Richard, and Later Writings, edited by J.A. Leo Lemay, and David Holmes's The Faiths of the Founding Fathers for information about this.) There is a lesson in this for both audience and speaker. It's dangerous to accept something just because it sounds true. Credibility can't be established just by saying what the audience wants to hear.

### Identifying Ethos

By now, you've hopefully gotten an idea of what ethos is: an attempt to persuade by appealing to authority or credibility. You might be wondering, though, what ethos looks like in writing or in speaking. Here are a few examples:

- **References to work experience or life experience related to the topic.** When an author writing about the stock market talks about his years working for an investment bank, that's...
an appeal to credibility.

- **References to college degrees or awards related to the topic.** When your biology instructor makes clear in the syllabus that he has a PhD in biology and that you'll be using the textbook he's written for the class, he's reminding you of his authority and credibility on the subject.

- **References to the character of the writer.** When a politician writes in a campaign brochure about his years of public service and the contributions he's made to the community, he's letting you know he's trustworthy, a good person, and a credible source of information about the community and the issues that affect it.

- **The use of supporting sources written by authorities on the subject.** When a student writes a paper about why school hours should be changed and uses quotations from principals, teachers, and school board members (all of whom know something about the topic), he's borrowing their credibility and authority to increase his own.

- **References to symbols that represent authority.** When a candidate gives a speech in front of an American flag, he or she is associating him- or herself with the symbol and borrowing the authority it represents.
Fallacious Ethos

By Jessica McKee and Megan McIntyre, University of South Florida

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Sometimes, rhetors attempt to build ethos in dishonest and/or unethical ways. While fallacious appeals to ethos might seem convincing at first, analysis often easily reveals the flaws in arguments built on fallacious ethos. Some examples of fallacious ethos include:

• **Ad Hominem (Argument to the Person):** Attacking the person instead of the argument. For example, “You say I shouldn’t drink so much, but you drink every day.” The validity of the argument (drink less) can’t be based on the behavior of the person making the argument. Instead, the validity of the argument should be evaluated on its own terms—separate from the person making the claim.

Ex: [http://www.youtube.com/watch?v=xyvyKcDR33o](http://www.youtube.com/watch?v=xyvyKcDR33o)

• **Argument from Authority:** Claiming to be an expert and, on that basis, to be deserving of trust. It’s important to remember that there are different kinds and levels of expertise: My weekend cooking class doesn’t make me an authority on recipes, though I can honestly say I’ve studied cooking. So, I might be an authority on some elements of cooking, but not all of cooking. When faced with an argument from authority, it is important to investigate the credentials of the speaker or writer.

• **Appeal to Authority:** Using a statement taken out of context as authoritative support. For instance, it would be fallacious to use Malcolm X’s declaration “by any means necessary” to justify an oppressed group’s violence against police officers. Such an assertion ignores the context, and therefore the complexity, of Malcolm X’s statement.

• **Argument from False Authority:** Using an expert in a specific field as an expert in all related fields. For instance, if I am writing a paper about heart disease and I quote my chiropractor, Dr. Wallace, then I would be making an appeal to fallacious ethos; despite being a doctor, she is not an authority on heart disease.

• **Appeal to Anonymous Authority:** Using appeals to nonspecific groups (e.g., doctors, scientists, researchers, and so on). For example, “Research shows that all women are inferior to men.” Or, “Studies indicate that all college students binge drink.” Neither of these statements offers a specific credible source, so both claims lack authority.

Ex: [http://www.youtube.com/watch?v=eQp6-8IDA2E](http://www.youtube.com/watch?v=eQp6-8IDA2E)

• **Inflation of Conflict:** Using a conflict between two authorities as a reason to dismiss their arguments and knowledge. For instance, it would be fallacious to assert that global climate change does not exist because two scientists disagree about its effects.
Pathos

By Kendra Gayle Lee, University of South Florida

Learning Objective

- Apply/adapt professional writing conventions, including genre, tone, and style for particular writing situations

“Let’s not forget that the little emotions are the great captains of our lives, and we obey them without realizing it.” – Vincent Van Gogh

Remember those after-school specials that aired on TV when you were a kid? They always had some obvious moral (like “don’t drink and drive”). And they were often really emotionally driven. At the end of the show, the camera would pan out, showing the protagonist alone and suffering for the poor decisions that he or she had made. When you were a child, that sort of heavy-handed emotionalism was effective in getting a point across. Now that you’re an adult, it becomes easier to feel frustrated, and even manipulated, by an overload of emotion. Emotion, or “pathos,” is a rhetorical device that can be used in an argument to draw the audience in and to help the audience connect with the argument. Relying too much on pathos, though, can make your writing sound like an after-school special.

Pathos works in conjunction with logos (logic), ethos (credibility), and kairos (timeliness) to help form a solid argument. However, not every argument employs all four rhetorical devices. Each writer must choose which combination of rhetorical devices will work well for his or her writing and will suit the chosen topic. Used correctly, pathos can make a bland argument come alive for the audience. Pathos offers a way for the audience to relate to the subject through commonly held emotions. However, it is important to determine when pathos will be useful and when it will only serve to muddy the argumentative waters.

Take, for instance, a student who is writing an essay on human trafficking. Human trafficking—abducting or entrapping people (usually women and children) and subjecting them to horrific working situations—should be a subject that is already fraught with emotion. However, once the student starts working on the paper, he notices that he has a collection of facts and figures from which the audience will easily be able to disconnect. What the student needs is to make the topic come alive for the reader. He needs to make the reader feel sympathy and horror. Then he comes upon a first-person account of a teenager who was trafficked into the United States. By incorporating her account into his essay (with proper citation, of course), he allows the reader to experience the teenager’s disbelief and fear. And by experiencing this emotion, the reader begins to develop his or her own emotional response: sympathy, horror, and anger. The student has helped the reader connect to his argument through the effective use of pathos.

Here’s another example of a new media text that employs pathos to elicit sympathy from its audience: https://www.youtube.com/watch?v=I09d2Pp7lQ

Pathos becomes a liability in an argument when it is inappropriate for the subject matter or genre of writing being used. For instance, if you are writing a letter to Publix supermarket to express your displeasure with its corporate response to migrant farmers’ call for a living wage, then a narrative encouraging sympathy for the plight of the migrant worker might not be as effective as a straightforward statement of purpose: if Publix doesn’t change its policies, you will take your business to a supermarket that is more interested in supporting social justice. An audience can also find an overload of pathos to be off-putting. For instance, after September 11, 2001, the majority of people in the United States experienced an overwhelming sense of anger and fear. However, when references to 9/11 were used extensively in some of the 2004 presidential campaigns, many people were outraged. Why? Because they felt as though their intense feelings about the tragedy of 9/11 were being exploited and cheapened by the candidates, and they were intentionally being made to feel fearful. They felt as though their emotions were being manipulated to obtain votes. In this case, an overload of pathos backfired on the candidates.

Understanding pathos is important for readers and for writers. As a reader, you want to be in tune with the author’s use of pathos, consciously evaluating the emotions the author tries to elicit. Then you can make informed decisions about the author’s motives and writing methods. As a writer, you want to be aware of proper uses of pathos, paying close attention to both your subject matter and your audience. There is no need to sound like an after-school special, unless, of course, you are writing for one.

It’s probably clear by now what pathos does: it evokes an emotional response from a reader by appealing to the empathy, fear, humor, or some other emotion. Now let’s look at a few examples of pathos that you may find in written, spoken, or visual texts:

- Anecdotes or other narratives. When a writer employs a narrative or anecdote, he or she is usually attempting to connect with the reader emotionally. For example, beginning an essay about human trafficking by relaying the personal story of a victim captures the attention of the audience because it humanizes the problem and draws on readers’ empathy.

- Images or other forms of media. When a writer uses images, songs, and other types of nontextual media, he or she is often attempting to engage a reader’s emotions. Songs and pictures produce emotional responses. For example, Toby Keith’s post-9/11 anthem, “Courtesy of the Red, White, and Blue,” seems to embody the nation’s anger after the 9/11 terrorist attacks. While you may not agree with the song’s sense of justice, the lyrics recall a painful time in our nation’s history. For many, that recollection prompts an emotional response.

- Direct quotations. Though quotations are used for a myriad of reasons, direct quoting from an individual who has been personally affected by an issue is usually an appeal to the emotions of a reader. For example, if I were writing an essay about breast cancer and I quoted a cancer patient, that quotation would be an attempt to humanize the topic and appeal to the sympathy of my readers.

- Humor. When a writer uses humor in order to illustrate a point, he or she is employing pa-
Though there is logic to satirical humor (as used on *The Daily Show* or *The Colbert Report*), the main appeal of such television shows is that they make viewers laugh.
Fallacious Pathos

By Jessica McKee, and Megan McIntyre, University of South Florida

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Although pathos can be an effective rhetorical tool, pathos can also be misused. When a rhetor attempts to play on the emotions of their audience at the expense of the other rhetorical appeals, then the rhetoric is likely using pathos in an unethical manner. Some examples of fallacious uses of pathos are:

- **Argument by Dismissal**: Rejecting an idea without providing a reason or explanation for its dismissal. For instance, there is a tendency to cry “socialism” when faced with calls for a single-payer system in the ongoing health care debate. Such a dismissal of the single-payer system may include the observations, “This is America!,” or, “You are free to live elsewhere if you prefer.” While we do live in the United States and people are free to live wherever they want, neither of these observations actually addresses the argument, either for or against the single-payer system. The observer relies on the simple (and fallacious) dismissal of the opposing viewpoint.

- **Argument by Emotive Language**: Using emotional words that are not supported by evidence and/or are unconnected to the argument being made. For example, in abortion debates regarding a woman’s right to choose, the argument sometimes shifts from a discussion of medical or legal rights to a graphic description of the abortion process or extreme analogies between abortion and genocide. Most would agree that genocide should be prevented and that the destruction of a fetus is a violent procedure, but these observations distract from the conversation about a woman’s medical and legal rights.

- **Appeal to Pity**: Drawing on irrelevant personal experiences or feelings in order to produce a sympathetic response. For instance, if I were writing about the necessity of universal health care and I included a personal anecdote about falling ill in Canada and being unable to receive free health care, that anecdote would be a fallacious appeal to pity. My personal experience, though interesting, does not illuminate the issue of universal health care.

- **The Slippery Slope**: Suggesting that a particular argument or course of action will lead to disastrous consequences without offering evidence. This fallacy usually produces an emotional response. A common example is the assertion that legalizing gay marriage will lead to polygamy, bestiality, and/or pedophilia.
Logos
By Emily Lane, University of South Florida

Learning Objective
• Apply/adapt professional writing conventions, including genre, tone, and style for particular writing situations

“Logos” is the appeal to logic. Logos isn’t logic like the formal logic in math, philosophy, or even computer science; it is the consistency and clarity of an argument as well as the logic of evidence and reason.

In formal logic, in abstraction, the following is the case: if A is true and B is true and A is an instance of B, then the repercussions of B will always be true. The problem, however, is that this kind of logic doesn’t work for real-life situations. This is where argument comes into play. Formal logic would say that speeding, for example, is a violation of traffic laws. A repercussion of violating a traffic law is a ticket; therefore, every person who speeds gets a ticket. However, in real life, not in abstract theory, things aren’t that cut and dried. Most people would not agree that all speeders, in every circumstance, should receive a ticket. In an argument about a real-life situation, the audience needs particulars to make their decisions. Sometimes there’s an exception. Why was that person speeding? Well, if an eighteen-year-old is speeding to show off for his friends, then yes, most people would agree that he deserves a ticket. However, if a man is driving his pregnant wife to the hospital, then maybe he does not deserve the ticket. One could, and probably would, make the argument that he should not get a ticket.

Let’s examine how the appeal to logic would work in an argument for the speeding father-to-be.

Because arguments are based on values and beliefs as well as facts and evidence, it is logical that the argument must coincide with accepted values and beliefs. The enthymeme is the foundation of every argument. Enthymemes have three parts: the claim, the reason, and the unstated assumption that is provided by the audience. All three of these things must make sense to your audience in order for your argument to be considered logical. The claim of an argument for the father-to-be could be something like, “This man should not get a speeding ticket.” That’s it. The claim is pretty simple. It is your educated opinion on the matter. The reason would be something like “because his wife is in labor in the backseat.” So the two stated parts of your enthymeme would be, “This man should not get a speeding ticket because his wife is in labor in the backseat.” Now, this seems obviously logical to us; however, what is our underlying value, our unstated assumption about this argument? Most of us would probably agree that a hospital is a better place to give birth than in a backseat. That is the third part of the enthymeme. Your audience must agree that your assumption is true in order for your argument to be considered logical. If your readers don’t have the same assumption, they are not going to see your logic. You must find an enthymeme that works for your audience. The pregnant wife enthymeme is fairly easy to see. In more volatile claims and reasons, the unstated assumptions can be trickier to identify and work out with your audience.

Reasons like “because his wife is in labor” are motivations for the driver’s actions, not evidence. Most audiences need facts. Evidence is the facts. Both reasons and evidence are used in an appeal to logic; however, reasons cannot be your only support. Evidence as to why the man should speed might include studies about the problems with births in difficult or dangerous circumstances, interviews with women who have given birth in automobiles, and infant mortality rates for births that do not occur in hospitals. As you can see, there are many different kinds of evidence you could provide for this argument.

Consistency means not changing the unstated or stated rules governing your argument. Consistency is essential to logic. Let us continue with the speeding example. If, for instance, you are arguing that the infant mortality rate is too high for babies born outside the hospital and that the father is required to speed for the safety of his unborn child, then you may not want to include evidence of the high infant mortality rate in car crashes. Although this information may be part of the infant mortality rate, it goes against the underlying assumption that speeding is acceptable because of the high risk of harming the baby if it is born in the backseat.

So why should you care about logos? In your own writing, logos is important because it appeals to your readers’ intellects. It makes your readers feel smart. Logos is the part of the argument where you treat your audience like purely rational, “only the facts, ma’am” kind of people. Also, gaps, leaps, and inconsistencies in logic, no matter how well developed the other appeals may be, can tear apart an argument in short order. This is the same reason you cannot ignore logos in others’ arguments either. All the appeals are linked together; for instance, if you use as evidence an article that has leaps in logic, this article could damage your own ethos as an author. It is important to remember that all four appeals, when used, must be well developed and work together to make a good argument.

As you now know, logos can be defined as a writer’s or speaker’s attempt to appeal to the logic or reason of their audience. Let’s look at some examples of logos that you might commonly find when reading texts of various media:
• Statistics. When a writer employs data or statistics within a text, you can probably assume that he or she is attempting to appeal to the logic and reason of the reader. For example, an argument in favor of keeping abortion legal may cite the May 2011 Pew Research poll that found 54 percent of Americans in favor of legal abortion. This figure makes a logical argument: abortion should be legal because the majority of Americans support it, and in a democracy, the majority makes the decisions.
• Causal statements. When you see an “if-then” statement, with credible supporting evidence, the writer is likely appealing to your reason. Consider an argument about lowering the drinking age from 21 to 18: a writer might suggest that, if the legal drinking age were 18, then people between 18 and 21 would be less likely to drive under the influence. If the writer offers evidence identifying the reason that some between the ages of 18 and 21 drive drunk is that they fear calling a friend or parent because they have illegally ingested alcohol, then this causal statement would be an appeal to a reader’s sense of reason.
• Relevant examples or other evidence. You might begin to think about logos as evidence that doesn’t involve an appeal to your emotions. Even expert testimony, which would certainly be an example of ethos, also could be an example of logos, depending on its content. For example, in a discussion about recent cuts in education funding, a statement from the Hillsborough County, Florida, superintendent would be an appeal to authority. But if that statement contained a discussion of the number of teachers and classes that would have to be cut if the state were to reduce the district’s funding, the statement from the superintendent could also be an appeal to logic.
Fallacious Logos

By Jessica McKee and Megan McIntyre, University of South Florida

Learning Objective

- Apply/adapt professional writing conventions, including genre, tone, and style for particular writing situations

When a rhetor relies on flawed or inconsistent logic to support an argument, he or she is relying on fallacious logos. Some examples of fallacious logos include:

- **Appeal to Nature**: Suggesting a certain behavior or action is normal/right because it is “natural.” This is a fallacious argument for two reasons: first, there are multiple, and often competing, ways to define “nature” and “natural.” Because there is no one way to define these terms, a writer cannot assume his or her reader thinks of “nature” is the same way he or she does. Second, we cannot assume that “unnatural” is the same as wrong or evil. We (humans) have made lots of amendments to how we live (e.g., wearing clothes, living indoors, farming) with great benefit.

- **Argument from Ignorance**: Assuming something is true because it has not been proven false. In a court of law, a defendant is, by law, “innocent until proven guilty.” However, judges and jurors must hear testimonies from both sides and receive all facts in order to draw conclusions about the defendant’s guilt or innocence. It would be an argument from ignorance for a judge or juror to reach a verdict without hearing all of the necessary information.

- **Straw Man**: Intentionally misrepresenting your opponent’s position by over-exaggerating or offering a caricature of his or her argument. It would be fallacious to claim to dispute an opponent’s argument by creating a superficially similar position and refuting that position (the “straw man”) instead of the actual argument. For example, “Feminists want to turn men into slaves.” This statement fails to accurately represent feminist motivations—which can be very diverse. Most feminists agree in their goal to ensure women’s equality with men. Conceptions of equality can vary among feminists, but characterizing them as men-haters detracts from their true motivations.


- **False Dilemma**: Assuming that there are only two options when there are, in fact, more. For example, “We either cut Social Security, or we have a huge deficit.” There are many ways to resolve deficit problems, but this statement suggests there is only one.

- **Hasty Generalization**: Drawing a broad conclusion based on a small minority. For instance, if you witnessed a car accident between two women drivers, it would be a hasty generalization to conclude that all women are bad drivers.

Ex: [http://www.youtube.com/watch?v=7dYHwncaNdc](http://www.youtube.com/watch?v=7dYHwncaNdc)

- **Cum Hoc, Ergo Propter Hoc (With This, Therefore Because of This)**: Confusing correlation with causation—that is, thinking that because two things happened simultaneously, then one must have caused the other. For example, “There has been an increase in both immi-
gration and unemployment; therefore, immigrants are taking away American jobs.” This statement is fallacious because there is no evidence to suggest that immigration and unemployment are related to each other—other than that their rates increased simultaneously.

Ex: http://www.youtube.com/watch?v=dFFktMZc_4o

- **The Slippery Slope:** We already noted that the slippery slope argument is often a way to scare readers or listeners into taking (or not taking) a particular action (see “Fallacious Pathos”). The slippery slope argument can also function as a false invocation of logic or reason in that it involves a causal statement that lacks evidence. For example, I might argue that if the drinking age were lowered from 21 to 18, vast numbers of college students would start drinking, which in turn would lead to alcohol poisoning, binge drinking, and even death. This conclusion requires evidence to connect the legality of drinking with overindulgence. In other words, it does not follow that college students would drink irresponsibly if given the opportunity to drink legally.
Chapter 1: Analyzing the Rhetorical Situation in Workplace Writing

Kairos

By Kate Pantelides, University of South Florida

Learning Objective

• Apply/adapt professional writing conventions, including genre, tone, and style for particular writing situations

“Kairos” is an ancient rhetorical concept that has gained importance in different disciplines over the centuries. So what is it? 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.

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 audience. Kairos is timeliness, appropriateness, decorum, symmetry, balance—awareness of the rhetorical situation or “the circumstances that open moments of opportunity” (Kinneavy, 1986; Sipiora, 2002; Vatz, 1983; Bitzer, 1968; Hill, 2002). Kairos is crafting serendipity, like when the sun comes out at the end of a romantic comedy after all the conflicts have been resolved.

In Greek, both kairos and chronos literally mean “time,” but kairos does not mean “time” in the same sense as used in contemporary English. In Greek, kairos represents a kind of “qualitative” time, as in “the right time”; chronos represents a different kind of “quantitative” time, as in, “What time is it?” and “Will we have enough time?” (Kinneavy, 1986; Stephenson, 2009). Kairos means taking advantage of or even creating a perfect moment to deliver a particular message.

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.

Although kairos has long been a key word for many disciplines, within the study of writing, kairos has been the topic of much debate in the last few decades. James Kinneavy is largely credited with reintroducing the importance of kairos into the discipline of Rhetoric and Composition and, thus, the composition classroom. According to Kinneavy, kairos is “the appropriate-
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 crises” or impending doom.** 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.

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.

Because kairos is so tied to the particular moment, or rhetorical situation, it is hard to provide concrete examples out of context. But a good way to think about kairos is to consider how rhetors try to persuade audiences 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.

Kairos is undoubtedly a pretty heady term, something with which ancient philosophers, modern rhetoricians, and contemporary writers have wrestled. But it’s worth wrestling with. 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 order and timing of your text.
- Be accommodative; appeal to each 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 into—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 beautiful writing that, like turning the key in your door at the end of a long day, seems perfectly timed, effortless, and just right.

By now, you should know what kairos is: an attempt to persuade through appeals to timeliness. Here are a few possible examples of kairos:

- **The call to “Act Now!”** An appeal to some particular fast-approaching moment is often a rhetor’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

ness of the discourse to the particular circumstances of the time, place, speaker, and audience involved” (84). Other scholars suggest that “kairos refers to a struggle, at the point of rhetorical intervention, between situational factors” (Sheridan, Michel, & Ridolfo, 2009). Both definitions get at the elusive, jaguar-in-the-jungle nature of kairos. Kairos is so hard to pin down because, as Phillip Sipiora suggests, it is a *dynamic* principle rather than a static, codified rhetorical technique (10). So, the rhetor must be “accommodative,” waiting for the right time, matching her text to the precise moment in order to be most successful (Sipiora, 2002). 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.

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- **The use of deadlines or goals.** Such appeals to kairos are often seen as part of fundraising
Fallacious Kairos

By Megan McIntyre and Jessica McKee, University of South Florida

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Just as rhetors can use ethos, logos, and pathos in unethical ways, kairos can be used unethically as well. Some examples of fallacious kairos include:

• **Red Herring:** Introducing irrelevant facts or claims to detract from the actual argument. For instance, our invasion of Iraq was predicated, in part, upon the connection between the attacks of 9/11 and Saddam Hussein. The war was described by some as an appropriate response to the terrorist attacks on 9/11, but in reality, the connection between Iraq and Saddam Hussein was a red herring. Hussein was not connected to Al Qaeda, the terrorist network that perpetrated the attacks, or 9/11.

• **Argument from Authority:** We already noted that an argument from false authority involves a speaker or writer claiming authority in a particular area without giving evidence of that authority (see “Fallacious Ethos”). These claims of authority are obviously connected to ethos, but depending on the argument, may also be connected to kairos. For example, when a political candidate claims that, if action is not taken right now, the nation risks ruin, he or she is identifying him- or herself as an expert on both the nature of the problem as well as the timing.

**Exercises**

1. Think about the materials that you craft when searching for a job: a resume and a cover letter, at minimum. How might you use the rhetorical appeals when composing these documents? Are there any rhetorical appeals that may not belong in these documents? If so, which ones, and why?


   Which rhetorical appeals are used in this press release? Are the appeals used effectively? Why or why not?

3. Find an infographic online that you find inspiring in some way. Perhaps the infographic is about a topic that is important to you, or perhaps it catches your eye for other reasons. Once you find an infographic that you like, analyze the infographic for the rhetorical appeals. How does the infographic use ethos, pathos, logos, and/or kairos? Does the infographic make effective use of all of the appeals? How so?

**References**


Chapter 2: Professional and Technical Writing Processes

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“GET IT IN WRITING”: New Survey Reveals Paradoxes About Workplace Writers

By Wilma Davidson and Thorold (Tod) Roberts, The University of South Florida Sarasota-Manatee

Learning Objectives

• Compose professional/workplace documents and oral presentations for multiple audiences and specific purposes using appropriate technologies
• Apply/adapt professional writing conventions, including genre, tone, and style for particular writing situations

How relevant are strong writing skills on the job? What can college students do -- in and outside the classroom -- to become better writers? And what can aspiring professional and technical writers do to gain a competitive edge in the marketplace?

A quick Google search reveals several helpful references on this topic, including these:

• http://smallbusiness.chron.com/importance-good-writing-skills-workplace-10931.html

Additionally, a recent survey of more than 250 working professionals provides valuable insights into how they view their own writing. By suggesting pragmatic ways to improve the writing of emails, memos, and reports, this article also helps students strengthen their job skills as they prepare for their own careers.

Survey Findings

Exactly what did the survey reveal? While you can see all questions and replies in the accompanying tables, the following responses provoked the most curiosity:

• Around 68 percent of workplace writers have confidence in their ability to write but only 42 percent of them get started easily—leaving a notable fifty-eight percent of workplace writers still struggling to get started.
• Almost 80 percent say they revise their writing, but only 37 percent believe they ultimately write what they need to in the fewest words possible.
• Approximately 34 percent feel they know what content to include and leave out, but only 36 percent indicate they ever seek feedback from others about their drafts.
• While 66 percent of workplace writers feel their writing works and 64 percent believe their readers are satisfied with their writing, only 52 percent of workplace writers are themselves satisfied with their writing.
• Workplace writers indicate that 90 percent of the writing done in the workplace consists of emails, 47 percent reports, and 33 percent PowerPoint presentations, but only 5 percent of writing consists of proposals.
• Almost 90 percent of workplace writers generate their business correspondence on the computer, but only 4 percent avail themselves of the technology accessible, literally, at their
fingertips on the computer, iPad, and smart phone to dictate a draft that is converted into editable text immediately.

So what might all this mean? If you, like many of the students in our classes, want to know how to make yourself stand out as a writer, there’s much here to inform your chances and to reverse the dismay and well-documented decline of writing skills in the workplace.

How can you as a future workplace writer increase your confidence and satisfaction with your writing?

Work on better evaluating your own work by analyzing your potential audiences, understanding your core messages, and drafting without being hampered too early by the critic or censor in your heads. Workplace writers’ high anxiety has been correlated with poor writing performance for years but not much attention has been paid to reducing that anxiety. Simply giving yourself permission to say it the wrong way in a first draft before you say it the right way in a final draft can ease the angst of writing.

How can a writer move quickly from a wordy, awkward draft to a concise, finished document?

Demystify your revision process. Workplace writers who write well have learned how to replace the writer’s hat with the editor’s so they can create messages for readers rather than for themselves. You can gain this understanding through such simple techniques as reading your drafts aloud, hearing an audio recording of a draft to spot weakness, asking a class mate to review your draft, and learning to use verbs, not nouns, to do the heavy lifting in your sentences. Use additional editors’ tips for finding and removing the classic symptoms of clutter from sentences and for replacing the almost-right word with the just-right one. (You can find an amusing how-to chapter on removing clutter in Business Writing: What Works, What Won’t.)

How can you distinguish between “nice-to-have” and “must-have” content?

The key here lies with solid audience analysis: anticipating what your workplace readers already know and need to know in order to make your hoped-for decision. How have the readers responded in the past? More experienced colleagues can lend a hand not only in explaining to you the readers’ needs but also in choosing the hot-button words and phrases that will get the desired attention to a message.

Why do only slightly more than half of the survey respondents feel their writing “works”? And how would you answer that question about the present state of your writing?

In the workplace, or in a college class, a business, technical, or student writer can ask these questions: Has a manager or professor’s feedback been negative and discouraging? Does the writer have to follow up with additional messages because the first one didn’t get the job done? If this survey response reflects a similar feeling that you have “always been weak at writing,” take heart. This is a common attitude that can often be traced to low grades on writing in school, or to being reluctant or embarrassed to ask another person to review and advise. And it’s entirely understandable because asking for help from another has often been viewed as cheating.

What role is played by the format of written documents?

The survey confirms that email has become the common communications medium for business professionals, and yet many users struggle to make their messages effective. While much faster and more convenient than documents transmitted on paper, email still requires a thoughtful understanding of your own message and of your reader’s expectations. Keep your reader’s expectations in mind when you enter the workplace.

Another frequently used medium is PowerPoint, a presentation tool that generates widespread criticism and yet has become indispensable to millions of business professionals. As with other media, a PowerPoint message is only as effective as the clarity and conciseness of its content and its focus on listeners’ needs, but very few companies provide even brief guidance in how to avoid rendering one’s audience comatose with boredom from too many slides that miss the mark. Learning to master this medium will also give you a competitive edge.

A surprising finding was the relatively low number of respondents who write proposals on the job. While the production of these documents is often led by a sales or marketing specialist, almost every student and employee can benefit from understanding the basics of how to structure, draft, and present a successful proposal. In fact, if new employees had such direction, they might feel freer to pursue proposals and new business initiatives. Here’s another form of writing to master to stand above the crowd.

Why do so many workplace writers immediately go to the keyboard but rarely to the “record” button?

With 30 to 40 percent of workers’ days spent writing, it is curious that they have not embraced the dictation of their messages more enthusiastically. The technology abounds: commercial dictation software on computers, iPads, and smart phones, along with free and inexpensive apps, is easily available. Even the iPhone’s Virtual Assistant Siri is a willing transcriber -- she’ll take dictation and transcribe it for your editing in a flash.

So why the reluctance to adopt this technique? Do only doctors and lawyers dictate their reports today? Why not try dictated text as a way to “talk your writing,” and imagine yourself more effectively addressing your absent audience, getting started more easily, and having a draft ready for massaging in less time than ever? After all, what is writing if not visible, literate speech? The best writing is not merely talk, but perfected talk. Our earliest language was oral—and there’s something to be said for getting back to it.

On March 30, 1876, Alexander Graham Bell used cutting-edge technology, his “electrical speech machine,” to say, “Mr. Watson, come here—I want you.” And the world changed as a result of his invention. It did so again with the advent of the computer.
We believe that “talking writing” has infinite possibilities for students of business and technical writing as well as for those already in the workplace. While it is not a panacea for the writing woes that stem from muddled thinking, incomplete knowledge of readers, and weak grammar, such a method of generating business messages may indeed help you get better and faster at imagining your audiences, at writing with the natural rhythms of conversation, and at finding writing a less onerous task.

Many managers complain frequently about the writing that comes across their desks, but few studies have asked workplace writers themselves to rate the efficacy of their writing and to share their perceptions. This survey attempted to elicit those perceptions and to infer what these comments suggest about how to improve your writing and your attitude toward it.

**Can Technology Lead the Way to Improvement?**

While our survey does not claim to provide an exhaustive view of the challenges faced by today’s workplace writers, it does offer useful suggestions that can make written communications faster, more concise, and more targeted to actual readers’ needs. The proliferation of computers and smart phones, with the ability to text and tweet, has resulted in more people writing than ever before—but it has not resulted in better writers. Perhaps it’s time to revisit how people generate their messages. Dictating can be easily mastered and we encourage it as student and workplace writers strive to “get it in writing.”

**Survey Demographics**

The 25-question survey was completed by a random mix of professionals fitting this profile:

- males and females
- ages 22 to 60+
- employed by their company from several weeks to more than 30 years
- all college graduates (holders of bachelor, master, or doctorate degrees)
- in middle to senior levels of management
- all employed at global companies that range in annual revenues from 2 to 40 billion dollars, and from such industries as consumer products, custom chemical products, pharmaceuticals, and telecommunications
- from almost every business function, including accounting, engineering, communications, sales, marketing, finance, human resources, training, research and development labs, and information technology

**Table 1. All Survey Responses (cont.)**

<table>
<thead>
<tr>
<th></th>
<th>Never</th>
<th>Seldom</th>
<th>Sometimes</th>
<th>Often</th>
<th>Always</th>
<th>NR</th>
<th>Mean</th>
</tr>
</thead>
<tbody>
<tr>
<td>I have confidence in my ability</td>
<td>0%</td>
<td>7%</td>
<td>25%</td>
<td>57%</td>
<td>11%</td>
<td></td>
<td>3.72</td>
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<tr>
<td>I spend time planning what I write.</td>
<td>1%</td>
<td>7%</td>
<td>38%</td>
<td>46%</td>
<td>8%</td>
<td></td>
<td>3.54</td>
</tr>
<tr>
<td>I tell my readers why I am writing</td>
<td>2%</td>
<td>16%</td>
<td>29%</td>
<td>39%</td>
<td>13%</td>
<td></td>
<td>3.43</td>
</tr>
<tr>
<td>I adapt my writing style to my reader</td>
<td>2%</td>
<td>11%</td>
<td>29%</td>
<td>47%</td>
<td>11%</td>
<td></td>
<td>3.54</td>
</tr>
<tr>
<td>As I write, I think about what my reader may already know.</td>
<td>1%</td>
<td>8%</td>
<td>28%</td>
<td>50%</td>
<td>13%</td>
<td>3.66</td>
<td></td>
</tr>
<tr>
<td>I am sure of what to keep and what to leave out when I write.</td>
<td>2%</td>
<td>12%</td>
<td>52%</td>
<td>31%</td>
<td>3%</td>
<td>3.21</td>
<td></td>
</tr>
<tr>
<td>As I write, I determine a logical sequence for my information.</td>
<td>0%</td>
<td>3%</td>
<td>18%</td>
<td>54%</td>
<td>24%</td>
<td>4.00</td>
<td></td>
</tr>
<tr>
<td>I think my writing moves smoothly from one paragraph to another</td>
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<td>7%</td>
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<td></td>
</tr>
<tr>
<td>I can say what I mean in few words.</td>
<td>1%</td>
<td>15%</td>
<td>48%</td>
<td>30%</td>
<td>6%</td>
<td></td>
<td>3.27</td>
</tr>
</tbody>
</table>

**Table 1. All Survey Responses**

<table>
<thead>
<tr>
<th>All Respondents (N = 257)</th>
<th>Never</th>
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<th>Often</th>
<th>Always</th>
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<th>Mean</th>
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</thead>
<tbody>
<tr>
<td>I get started writing easily</td>
<td>2%</td>
<td>13%</td>
<td>42%</td>
<td>37%</td>
<td>6%</td>
<td></td>
<td>3.31</td>
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<tr>
<td></td>
<td>5</td>
<td>34</td>
<td>109</td>
<td>94</td>
<td>15</td>
<td>0</td>
<td>42%</td>
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</table>

**Table 1. All Survey Responses (cont.)**

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### Experiments

1. Do a Google Search on “workplace writing.” What types of documents do you find? Do these documents seem to corroborate or cast doubt upon the survey results discussed in this article? How so?

2. The results of the survey indicate that while 80% of workplace writers revise, only 36% seek feedback from others during the drafting process. As you know, the importance of document review is a central feature of the course, yet many students are somewhat uncomfortable with the process of providing feedback to their peers. Why do you think that professional writers might be resistant to ask their peers for feedback? Do you think document review is valuable for workplace writers? Why or why not?

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Writing Processes: Introduction
By Joseph Moxley, University of South Florida

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<tr>
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Writing Processes

Based on scholarship and research in the field of Writing Studies, the term “writing process” refers to a set of attitudes about composition and literacy practices. Drawing on this body of work, faculty assume that writing processes may differ from person to person and that different projects may affect which composing strategies are employed. Since the early 1980s, writing instructors have tended to restructure their courses so that students have greater opportunities to review their work in response to instructor and/or peer feedback.

Thinking rhetorically about one’s audience and purpose, collaborating, researching, organizing texts for readers at “global” and “local levels,” maintaining focus, practicing diverse invention strategies, designing one’s format rhetorically, revising, editing, and publishing—are some of the dominant activities that characterize what is broadly conceived of as “the writing process.”

Believing & Doubting

The writing process entails two contrary processes: believing and doubting. For many students, writers—for many people, in fact—being critical and judgmental can come easily. Hence, the truisms “it’s easier to critique them to create” (Alcott). Yet it is especially important, particularly in the early stages of a writing project, for writers to put doubt and criticism aside.

A range of writing activities, behaviors, and attitudes can enhance—or thwart—your ability to write successfully in academic or in workplace settings. However, no factor is more important than “playing the believing game,” which simply means staying positive, ignoring the internal critic, and having faith in the writing process—faith that with revision, lousy first drafts can become effective, even elegant final drafts. As hard as it sometimes is to stay positive while working on a document, give yourself encouraging, energizing messages, such as “I can do this...I have enough time...I’m smart enough...” If you find your writing/revision process to be undercut by negative, energy-draining messages, pull out a sheet of paper and draw a line down the middle of the page. On the left-hand side, write down the negative message. Then, on the right-hand side, write a more affirming message, one that either contradicts the negative statement or that shows a way around the problem.

Rather than being hypercritical of your work, energize your work by focusing on more positive messages. Manage your writing process with the awareness that an early first draft provides insufficient information to assess what the final draft will look like and develop effective writing habits. If you are required to complete a collaborative project in the class, don’t automatically assume it will be a disaster, or that one or two people will end up doing the work of the group. While ideally it makes sense to play the believing game during the time you are working on the document, you may find it most helpful to emphasize believing during the early stages of a writing project. On the other hand, you may find it most helpful to “play the doubting game” in the final stages of a writing project.

While playing the believing game is critical to the Writing Process, at times you need to play the doubting game—that is, examining your ideas and drafts in a critical (even hypercritical) manner. On occasion, you need to step back and ask yourself critical questions, such as “Am I providing the narrative that my readers need to find my analysis compelling? Is my evidence truly credible? Jeez, is this wordy? Can I say the same thing in half the word count?”

Organizing, focusing, inventing, formatting, revising, editing, and publishing—these activities are essential to playing the doubting game, a process that is necessary as you work your way toward meaning, significance, and clarity. Successful writing rests on being critical and reflective about your rhetorical situation, the quality of your evidence, and the best way to organize a document for the reader.

Balance Believing with Doubting

Just about everyone has moments of despair and doubt about their writing. After countless hours and the feeling that your work has been futile, that you have not clearly expressed an important concept or relationship, you may feel the urge to give up, to abandon the project. But you can’t give up. To be a successful writer (or really, to be a successful person) you need to emphasize believing. Especially in the beginning of a writing project, you need to set aside doubt, self-criticism, and despair. You need to emphasize the positive. After all, down the line, when your work is graded or critiqued by readers, you have plenty of time for self-criticism and doubt.

Why Belief is Important

One difference between successful writers and those who fail is that successful writers have faith in the creative process. In other words, even when they come close to despairing, they believe their rough drafts will become crystal clear—with effort. They believe they will develop an argument that synthesizes all of their reading. They believe that they will identify some innovative, creative interpretation. Buried deep in their rough drafts, they hope to find the seed of an

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When Charles Darwin spent his early twenties and thirties writing obscure essays on barnacle taxonomies, he didn’t give up. He kept writing, thinking, working, and eventually he created an elegant theory that transformed society: Darwin’s Theory of Evolution.

Whenever you become discouraged about your writing or about your potential as a writer, remember that successful authors did not become competent overnight. In fact, for most people, learning to write well is a lifelong process, an apprenticeship.

Why Doubt is Important

Writing can be discouraging. After hours of effort, you can end up with a product that absolutely fails to express what you intended. Plus, the feedback and criticism of your classmates and teachers can be depressing. When there is a large gap between what you said and what you meant to say, you can easily get down on yourself, telling yourself that you are not a good writer and that you will never be good at writing.

Sometimes, however, you need to shut off the negative voice within you and trust the generative nature of language to help you find exactly what you want to say. You must have confidence that your writing will be concise, coherent, and persuasive, given enough time and effort.

Of course it’s true that writers must balance the negative with the positive. To be a successful writer you must be a realist: You must understand others will interpret your words in ways you cannot anticipate. Critics will identify unexpected weaknesses in your presentations. Being able to take the audience’s view and accept criticism are helpful components of the writing process. Successful writers try to anticipate the reactions of readers and critics. Indeed, writers must be critical of their ideas. There are some writers who tend to be especially reluctant to be critical of their work, who look on their writing as a reflection of their being. Writers who look at their work to affirm their insightfulness will not see glaring logical flaws. Those who look only to reaffirm their creativity may ignore the importance of others’ views, research, and scholarship.

Exercises

1. Think of a time in your past when believing in yourself helped you accomplish something or overcome a challenge. How did you maintain your confidence in this situation? How did believing in yourself make a difference? How might you apply some of these same strategies to your writing?

2. Use a piece of your writing that is in its final stages (this could be an email, a short assignment, or a longer writing project), and play the doubting game. Put yourself in the position of the intended reader, and think critically about your writing. Are your ideas clear? Is your tone appropriate? Are there any words or ideas that your audience may not understand, or worse, misconstrue? Based on this analysis, summarize the revisions you might make to this piece of writing.
Writing Processes: Planning

By Angela Eward-Mangione, University of South Florida

<table>
<thead>
<tr>
<th>Learning Objectives</th>
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<tbody>
<tr>
<td>• Compose professional/workplace documents and oral presentations for multiple audiences and specific purposes using appropriate technologies</td>
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</table>

Types and Benefits of Planning

All writing, whether professional or technical, requires planning. The ability to write audience-centered, persuasive, purposeful, and concise messages does not come naturally. Very few writers, especially those who are still developing their skills, can sit down and compose an effective e-mail, report, or presentation without planning. Creating a writing plan helps you understand the primary tasks of a writing situation, how long each task will take, and when you should complete each task in order to meet the final deadline. Following a systematic prewriting process can help both beginning and experienced writers become successful. For professional and technical writers, “prewriting” includes analyzing the audience, anticipating how they will react, choosing a medium, and developing a writing plan.

To develop a writing plan, create a work schedule that includes all the tasks involved in the assignment and the dates by which you plan to complete each task. The tasks and completion dates can be recorded in a planner, a journal, a spreadsheet, a table, or a Gantt chart. As Figure 1 illustrates, a Gantt chart (named after inventor, Henry Gantt) helps you manage time by identifying tasks that can take place simultaneously versus those that must be completed sequentially. Since a color-coded assignment key can be used to associate certain team members with specific tasks, Gantt charts are also useful for managing team projects.
You have also heard that you should have a LinkedIn Profile (https://www.linkedin.com/static?key=what_is_linkedin&trk=hb_what). Of course, you will also need a cover letter and a résumé. Finding a new part-time job is not an emergency, but you want to locate and land one within the next few months.

A three-column work schedule may be more effective than a Gantt chart for this writing situation since you do not plan to compose your LinkedIn profile, résumé, or cover letter with a team. You may, however, ask your peers and the Career Center to review your documents before you publicize or disseminate them. Below is a sample work schedule that might fit your prewriting needs for this writing situation.

<table>
<thead>
<tr>
<th>Project Task</th>
<th>Your Time Allotment</th>
<th>Your Due Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Conduct research about career</td>
<td>1 day</td>
<td>Aug. 27</td>
</tr>
<tr>
<td>Locate a relevant job advertisement</td>
<td>1 day</td>
<td>Aug. 28</td>
</tr>
<tr>
<td>Conduct research (e.g., information about the company, who to address the cover letter to, etc.)</td>
<td>1 week</td>
<td>Sept. 3</td>
</tr>
<tr>
<td>Learn about LinkedIn (<a href="https://www.linkedin.com/static?key=what_is_linkedin&amp;trk=hb_what">https://www.linkedin.com/static?key=what_is_linkedin&amp;trk=hb_what</a>) and create a profile</td>
<td>2-3 days</td>
<td>Sept. 5</td>
</tr>
<tr>
<td>View LinkedIn Training – How to Make your Profile More Attractive to Recruiters (<a href="https://www.youtube.com/watch?v=pcBtFLTqUz8">https://www.youtube.com/watch?v=pcBtFLTqUz8</a>)</td>
<td>5 minutes</td>
<td>Sept. 5</td>
</tr>
<tr>
<td>Revise LinkedIn profile</td>
<td>1 day</td>
<td>Sept. 8</td>
</tr>
<tr>
<td>Gather information for résumé</td>
<td>1 day</td>
<td>Sept. 9</td>
</tr>
<tr>
<td>Draft résumé</td>
<td>2 days</td>
<td>Sept. 11</td>
</tr>
<tr>
<td>Draft cover letter</td>
<td>1 day</td>
<td>Sept. 12</td>
</tr>
<tr>
<td>Ask peer and career center to review résumé and cover letter</td>
<td>2 days</td>
<td>Sept. 12</td>
</tr>
<tr>
<td>Revise résumé and cover letter</td>
<td>4 days</td>
<td>Sept. 19</td>
</tr>
</tbody>
</table>

Consider the following example. You are currently working in a part-time job that is unrelated to your major and career choice. You decide that you want to replace that job with another part-time job or internship that relates to your major. You need to research your career choice before carefully selecting a job advertisement for which you can apply. You can use a three-column work schedule to manage your time effectively.

<table>
<thead>
<tr>
<th>Project Task</th>
<th>Your Time Allotment</th>
<th>Your Due Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Analyze Audience(s)</td>
<td>2 days</td>
<td>Aug. 29</td>
</tr>
<tr>
<td>Write project schedule</td>
<td>1 day</td>
<td>Aug. 30</td>
</tr>
<tr>
<td>Conduct research</td>
<td>1 week</td>
<td>Sept. 5</td>
</tr>
<tr>
<td>Create outline for deliverables</td>
<td>2-3 days</td>
<td>Sept. 10</td>
</tr>
<tr>
<td>Draft deliverables</td>
<td>1 week</td>
<td>Sept. 17</td>
</tr>
<tr>
<td>Have reviews of documents conducted</td>
<td>1 week</td>
<td>Sept. 24</td>
</tr>
<tr>
<td>Revise deliverables</td>
<td>3 days</td>
<td>Sept. 27</td>
</tr>
<tr>
<td>Edit deliverables</td>
<td>2 days</td>
<td>Sept. 29</td>
</tr>
<tr>
<td>Proofread deliverables</td>
<td>1 day</td>
<td>Sept. 30</td>
</tr>
<tr>
<td>Submit deliverables</td>
<td>15 minutes</td>
<td>Sept. 31</td>
</tr>
</tbody>
</table>
Strategies for Effectively Planning Writing Projects

1. Analyze the writing situation: who are the audience(s), how might they react, what deliverables do you need, and what time frame do you have? Is the writing task geared towards individuals or teams?

2. Generate a list of tasks that the writing situation requires: what research do you need to conduct, who do you need to interview, what text(s) do you need to compose, who can review your deliverables, what revisions and editing will you want to conduct?

3. Estimate the amount of time each task will take you and/or your team members. Remember to consider the final deadline for your project.

4. Design a work schedule in the form of either a table or a Gantt chart. Include the list of tasks for your project in the design. Use reverse planning to fill in the due dates for tasks: begin with the final due date and to work backwards in your plan by using your estimated time for each task. In the above table, the writer plans to complete the editing and proofreading of his or her work on Sept. 22 in order to send the final drafts by Sept. 23.

5. If applicable, consult with your team members to finalize your plan.

Exercises

1. For the writing project you are currently working on in this class, create a work schedule, using either a three-column table or a Gantt chart. In addition to including the work you have already done for the project and the work you still need to do, you should also compose a short justification that explains why you chose either a table or a Gantt chart to keep track of your work schedule.
Learning Objective

- Compose professional/workplace documents and oral presentations for multiple audiences and specific purposes using appropriate technologies

Introduction

Composing involves more than putting your thoughts into words. Composing involves assembling ideas, words, sentences, paragraphs, and visuals to accurately, ethically, and coherently address a writing situation. This task of assembly can be best accomplished in two phases—outlining and drafting. An outline serves as a blueprint for your draft. A draft presents the careful assembly of particular units to form a whole.

Outlines

Contrary to popular opinion, outlining is part of the composition process. Once you have analyzed your audience and selected an appropriate medium, you are ready to begin your outline. Your outline is like a “blueprint” for your draft: it is a design that tells you how you will organize your message, how you will sequence your key ideas, and how you will support those ideas. In contrast to a draft, you are the audience of your outline. As the table below illustrates, though, you will keep your audience in mind as you write your outline.

<table>
<thead>
<tr>
<th>Products</th>
<th>Writer Aware of Target Audience(s)?</th>
<th>Audience of Product?</th>
<th>Polished Product?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Blueprint/Outline</td>
<td>Yes</td>
<td>You</td>
<td>No</td>
</tr>
<tr>
<td>Draft</td>
<td>Yes</td>
<td>Them</td>
<td>Yes</td>
</tr>
</tbody>
</table>

Begin an outline by creating a list of information you think the readers will need or expect. For example, if you are crafting a document about the Environmental Protection Agency’s role in fluoride in drinking water, your list might look like this:

- Explain what the EPA is doing about fluoride in drinking water
- Define what fluoride is
- Explain how fluoride gets into drinking water
- List some of the effects of fluoride
- Include specific data
- Refer to Safe Water Drinking Act

Next, organize the list into a map that will guide the reader from point to point. Create an introduction, body, and conclusion, and then decide how you will divide each topic into subtopics. An outline for the points above might read:
I. Introduction—Define fluoride

II. Body
A. Explain how fluoride gets into drinking water
B. List some of the effects of fluoride
C. Explain how fluoride is regulated (1974 Safe Drinking Water Act; MCLGS, Maximum Contaminant Levels)

III. Conclusion—Describe the EPA standards

For a long, complex document, use a format that includes:

- Roman numerals (i.e., I, II, III) to indicate the three main sections (introduction, body, conclusion)
- Indented capital letters (e.g., A, B, C) to indicate the first level of subtopics
- Indented Arabic numerals (e.g., 1, 2, 3, 4) to indicate the second level of subtopics
- Indented lowercase letters (e.g., a, b, c, d) to indicate the third level of topics

This outlining strategy is known as alphanumeric notation. Other types of outlines, including full sentence outlines and decimal outlines (https://owl.english.purdue.edu/owl/resource/544/03/), may also help you compose an effective design for your draft.

After you have completed your outline, you are ready to write a draft.

Drafts
Drafts offer you the opportunity to coherently present your ideas in chunks as you choose powerful words to create unity and coherence and project a positive image of you and the company. As you draft, it can be useful to think of the various unit levels of a composition—words, sentences, paragraphs, and visuals (or figures).

Select powerful words by choosing concrete rather than abstract words. An abstract word expresses a quality, concept, or characteristic. A concrete word stands for something you can touch, see, or visualize. The problem with abstractions is that they can be interpreted differently by different audiences, particularly international audiences. Balance abstractions by choosing strong, concrete words that are familiar to the reader and that do not consist of jargon.

Assemble strong, powerful words into effective sentences: carefully assemble ideas and supporting details by employing varying sentence types—simple, compound, complex, and compound complex sentences. Vary the subjects of your sentences. Maintain a focus on the “you culture,” perhaps beginning many sentences with the subject “you.”

<table>
<thead>
<tr>
<th>Types of Sentences</th>
<th>Description of Sentence Type</th>
<th>Examples of Types of Sentences</th>
</tr>
</thead>
<tbody>
<tr>
<td>Simple Sentence</td>
<td>Contains one complete thought (an independent clause) with a subject and predicate verb.</td>
<td>The annual sales meeting will begin at 8 a.m.</td>
</tr>
<tr>
<td>Compound Sentence</td>
<td>Contains two complete but related thoughts. The two thoughts (independent clauses) may be joined by a conjunction, a semicolon, or by a conjunctive adverb.</td>
<td>The Institute for Responsible Technology protects consumers, so we will research its viewpoint on genetically engineered foods.</td>
</tr>
<tr>
<td>Complex Sentence</td>
<td>Contains an independent clause (a complete thought) and a dependent clause (a thought that cannot stand alone by itself).</td>
<td>After conducting research, I started writing a feasibility analysis for converting Company X’s office building from oil to gas heating.</td>
</tr>
<tr>
<td>Compound Complex Sentence</td>
<td>Contains at least two independent clauses and one dependent clause.</td>
<td>The large training room in the Corporate Professional Development Area (8th floor) would be ideal for the next meeting; before submitting your next report, please confirm that this room can be reserved for March 10.</td>
</tr>
</tbody>
</table>
Assemble effective sentences into cohesive paragraphs by beginning each paragraph with a topic sentence. The topic sentence should foreground the content of the paragraph. Then, carefully list supporting details in the order of importance. Use methods such as compare and contrast, cause and effect, classification, and problem and solution to assemble your supporting details.

Last, add figures to illustrate or represent specific information. For example, if you want to illustrate either the increase or decrease of fluoride in drinking water from 1974 to the current year, you might consider integrating a bar graph into your composition.

**Workplace Example**

Let's look at an example from a workplace situation.

Imagine that the manager of human resources asks you to compose a step-by-step instruction memo for employees. The memo should explain the steps to follow in the event that a fire-related emergency occurs. Knowing that you will need time to research fire-safety protocol, you create a writing plan, compose an outline for your document, compose a draft of your document, and submit a draft of your document to a colleague for review.

To create an outline, begin by composing a list of information that you think the reader will expect and need:

- Explain why the company is disseminating fire-safety instructions
- Define situations in which instructions should be followed
- Explain the dangers of a fire
- List steps to follow in case of a fire
- Refer to the employee handbook for a map of the facility

Next, organize the list into a blueprint that will guide the reader from step to step.

1. **Introduction**—Define fire-related emergency and explain why procedures are being updated
2. **Body**
   A. Explain how fires get started in a workplace
   B. List some of the effects of workplace fires
   C. List and explain the steps to follow in the event that a workplace fire occurs
3. **Conclusion**—Describe the company standards and policies

Begin the memo with a brief introduction that addresses the danger and importance of fire-related emergencies and explains the reasons for the dissemination of the memo.

As you compose the body of the memo, begin each step with a powerful action verb to create unity in all of the steps and to project a positive image of you and the company.

For example, instead of survey or evaluate the situation, try pull the fire alarm to alert others of the presence of a fire.

   Instead of consider the safety of others, try accompany visitors to the emergency exits.

Next, assemble strong, powerful words into effective sentences. Use an enumerated list to present the steps in the memo.

1. Pull the fire alarm.
2. Pick up the emergency phone and contact the manager of your building.
3. Dial 911 in order to alert local safety personnel about the fire-related emergency in your building.
4. Accompany visitors to the emergency exits, and exit the building immediately so that fire-safety personnel can extinguish the fire.

Finally, add a brief conclusion that reminds the reader of the importance of the memo and the need to keep it in a visible place. If necessary, include images that represent various fire-safety locations or exits in the building.

**Conclusion**

Writing an outline can help you design your composition, and carefully assembling words and sentences into paragraphs can help you compose any professional or technical document for today's twenty-first century writing demands.

**Exercises**

1. Pull out your most recent draft of the writing project you are currently working on in this course. Look through your writing, and mark any areas in which you are using abstract language. Then, suggest concrete language that could add specificity to these areas of your writing.
2. Using the same writing project you worked with in exercise 1, create a reverse outline. To do this, you will read through your writing project and create an outline of what you have written. If you created an outline before composing this draft, how does your original outline compare to the reverse outline you just created? If you did not begin with an outline, evaluate your reverse outline; looking only at the outline, does your paper seem to be organized clearly and logically?
A Systematic Approach to Document Review: Top-Down Editing for Reports and Other Long Documents

By Julie Staggers, University of South Florida

Learning Objectives

- Compose professional/workplace documents and oral presentations for multiple audiences and specific purposes using appropriate technologies
- Design documents, visuals, and data displays that are rhetorically effective, accessible, and usable for specific audiences
- Apply/adapt professional writing conventions, including genre, tone, and style for particular writing situations

While you may do quite a bit of writing in professional and technical settings that does not require revision, most of the important writing you do will need revision. Documents that are going out to clients or to the public, longer documents, more formal documents, and documents written by multiple authors are some examples of pieces that may need serious revision rather than just a little quick editing.

Key terms

- **Document review** is the process of evaluating a document to determine what changes are required before the document is ready to be published or distributed.
- **Revision** is the process of making larger-scale changes to the content and structure of reports and other documents.
- **Editing** is the process of making sentence-level changes to a document.
- **Proofreading** is the process of making final changes to eliminate surface errors in a document.

Revising a document you wrote yourself can be hard work. Revising a document written by a group can be even more difficult for a number of reasons:

- Once text exists, it’s hard to get rid of it either because writers don’t want to “lose” their hard work or are afraid of cutting important information by mistake.
- Documents – and especially formal reports – address multiple types of readers whose needs and ways of interacting with the document differ.
- Documents that have been written by a team will have more problems with consistency than documents written by individuals.
- Writers may disagree about what changes to make.

Writing teams need to take a systematic approach to document review. Dr. Patricia Sullivan at Purdue University developed a structured approach for reviewing reports known as Top-down Editing. Dr. Sullivan’s approach can be applied to a wide range of medium-length and longer documents. It is a particularly effective strategy for identifying revision needs in documents that have been written by multiple authors; it allows reviewers to identify shifts in approach and terminology across sections.

Using a structured inspection approach like top-down editing helps a team prioritize its revision efforts. It also allows the team to make strategic decisions about what work can be done and should be done given the time available and the relative importance of the project. Furthermore, such an approach can help you answer the following questions:

1. What are the most significant problems in the document – and where are they located?
2. How much time do we have for revisions and editing?
3. Should we spend our time on the top-level design of the document, the content of a particular section, or sentence-level problems?

Note: Revision and editing require time. When your time is limited, your only option may be to focus on sentence-level problems, spelling, and surface errors.

Using the Top-Down Process

The top-down editing process described below is adapted from “Top-down Editing: A Structured Approach to Revising Reports” from Professional Writing Online 3.0, 3rd ed., by James Porter, Patricia Sullivan, and Johndan Johnson-Eilola.

While the name of this method – top-down editing – implies that you are simply editing, this process actually includes document review, revision, and editing. This process has four stages: 1) Inspecting the document at the top level and section level of its design, 2) Identifying the biggest problems and setting priorities for revision, 3) Inspecting and editing paragraphs and sentences, and 4) Doing a final check to make sure the context is clear and transitions between sections are effective.
1. **Inspect the document at top- and section-levels**

**TOP LEVEL:** Begin your inspection by focusing only on the top-level design elements:

1. the title
2. the introduction
3. the headings
4. the table of contents (for longer documents, if a table of contents exists)

At this point, you’re looking for problems in the document’s skeleton. Your intended readers should be able to look at only the title, introduction, and headings (along with the table of contents if one exists), and answer these questions:

- What is this report about?
- What organizational problem or need is being addressed?
- What is the occasion for this report?
- What type of report is this?
- What will this report accomplish?
- Where in this report can I find answers to the questions I might logically have?

If you cannot answer these questions, make notes about the problems you see. You’ll want to compare notes with other members of your team so you can decide where to focus your time and energy during revision.

At the top level, you’re likely to encounter rhetorical problems, structural problems, and problems with language.

For **rhetorical** problems, check to see if....

the “problem”

- is clearly stated
- can be solved with this plan/document
- meets the organization’s real needs

the argument

- is aimed at the primary audience
- is convincing
- is clear
- is well-marked

respect

- is shown to all people addressed or referred to
- is shown to competitors

For **structural** problems, check to see if the...

introduction

- provides context (i.e. makes the occasion clear)
- states the problem clearly and concisely
- forecasts content

**discussion**

- has a clear and consistent plan
- uses headings consistently and effectively
- provides a clear conclusion*  
  
  *We mean conclusion in the sense of a “judgment or decision supported by reasoning” and not “the final section.”

**information**

- is in the proper section
- has balanced development
- is complete

**visual/verbal marking**

- is clear and consistent for
  1. headings
  2. topic sentences
  3. lists (bulleted, numbered, or outline)

**color**

- is used consistently throughout the document

**visuals**

- are coordinated to sections in which they appear (more generic visuals go with summaries or overviews, more specific visuals help support data and detailed discussions and are placed close to those discussions)
- are marked consistently and clearly
- are relevant to the section or point they are supporting

For **language** problems, check to see if....

**headings**

- use language that is appropriate for the reader

**key terms**

- are consistent across sections

Continue your inspection by examining each section of the document. Look at headings, opening paragraphs, subheadings, topic sentences, transitions, and visuals.

Your intended readers should be able to skim a section and answer these questions for that section:

- What is this section about?
- What is the function of this section?
- What topics does this section address?
- How does this section connect to the sections before/after it?

If you cannot answer these questions, make notes about the problems you see. You’ll want to compare notes with other members of your team so you can decide where to focus your time and energy during revision.

At the section level, you’re likely to encounter rhetorical problems, structural problems, and problems with language.
To find rhetorical problems, ask these questions:

- Does the opening mislead readers?
- Do the headings mislead readers?
- Are the visuals and data appropriate for the target audience?
- Does color or design mislead readers by focusing their attention on less important information?

To find structural problems, ask these questions:

- Is this section placed where conventional report structure would position it? (Is this where a reader would expect to find this section?)
- Does the heading adequately and accurately reflect the section’s contents? (e.g., does the heading say the section is going to address a topic that the section does not actually address?)
- Is space evenly allocated to each topic? (e.g., are topics unbalanced, do key topics need to be addressed in more depth because readers will find them challenging?)
- Is color used consistently?

To find language problems, ask these questions:

- Is the language appropriate for the target audience(s)?
- Are key terms used consistently across sections?

2. Target the biggest problems

If you’re reviewing a document with your co-authors or members of an editing or document review team, you’ll need to compare notes and agree on a plan for revising the document. You may need to balance your priorities for revision because of time constraints. The less time you have for revision, the fewer options you have for making substantial changes to the top- and section-level design of the document. Because these sections play such an important role in meeting your reader’s needs, it is important to build time for review and revision into your project schedules.

3. Inspect paragraphs and sentences

Now you’re ready to review the document’s paragraphs and sentences. You’re looking for problems that interfere with the reader’s ability to understand your message. You can review paragraphs and sentences at the same time. Just read the document paragraph by paragraph placing check marks as you go. Place check marks next to:

- Sentences you find tedious
- Sentences you have to read more than once
- Sentences you don’t quite feel right about

To revise, focus your efforts on the sections where you have the most checks first (the bigger problems are there). Use your passage- and sentence-level strategies to revise. (See the Resources at the end of this reading for editing resources.)

Typical problems include:

- Non-parallel structure in lists
- Overuse of passive constructions
- Inconsistent references to terms/people/ideas
- Inconsistent/inappropriate tone: inconsistent person, number, or tense
- Gratuitous repetition, expletive openings
- Missing or inaccurate punctuation (pay particular attention to colon and semicolon use)
- Fragmented sentences
- Misspellings

4: Check context-making and transitions

You need to do one last check before you’re ready to go on to proofreading. Return to the opening section and check to see if the context-making is clear and accurate. Make sure that – now that revision is complete – a reader can read the opening section and answer these questions:

- What is this report about?
- What organizational problem or need is being addressed?
- What is the occasion for this report?
- What type of report is this?
- What will this report accomplish?

Then, read through the document one final time focusing on the transitions between sections. Transitions are crucial for ensuring coherence. If you are missing transitions or have transitions that don’t work, they should be fairly easy to spot in your revised draft. Once you’ve edited any rough transitions, you’ll be ready to move on to proofreading.

Recommended resources

David McMurray’s Online Technical Writing textbook includes an excellent chapter on Power Revision Techniques. (https://www.prismnet.com/~hcexres/textbook/hirevov.html)

Purdue OWL’s resource on Revision in Business Writing includes advice on revising for clarity, tailoring language for readers, and organization and correctness. (https://owl.english.purdue.edu/owl/resource/648/1/)

Purdue’s OWL resources on Transitions and Transitional Devices includes advice on writing transitions and choosing transitional devices. (https://owl.english.purdue.edu/owl/resource/574/1/)

References


https://owl.english.purdue.edu/owl/resource/648/1/
Exercises

1. Alone or in a group, brainstorm reasons you dislike revising and editing. Then, brainstorm all of the advantages of revision and editing. Discuss your list, comparing the advantages and the dislikes.

2. Find a document (report, proposal, white paper, etc.) that is at least ten pages long (ideally, you will find a document that has a table of contents) that is written for an audience in your field. Perform the inspection for the top-level design elements, answering the questions regarding the document's skeleton. Discuss the effectiveness of this document's top-level design.

3. Consider some of the difficulties that may arise when revising and editing a document written by a group. How might you handle those difficulties? Next, consider the difficulties that may arise when revising and editing a document written solely by you. How might you overcome those difficulties?
Chapter 3: Employment Documents

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LinkedIn: Are You Making the Key Connections? .................................... 106
Preparing Job Materials: Job Ads

By Cassandra Branham and Megan McIntyre, University of South Florida

Learning Objectives

- Compose professional/workplace documents and oral presentations for multiple audiences and specific purposes using appropriate technologies
- Design documents, visuals, and data displays that are rhetorically effective, accessible and usable for specific audiences
- Apply/adapt professional writing conventions, including genre, tone, and style for particular writing situations

Getting a job is hard work. Higher than normal unemployment and significant increases in the number of college graduates mean that even well-qualified applicants may find it challenging to land the position they want. This chapter endeavors to help you set yourself apart – in a positive way – by improving the one part of the job search you can control: your application materials.

The sections that follow will help you create and improve your job materials by connecting information gleaned from job ads and corporate websites to experience you already have so that you can position yourself as uniquely qualified for the position you want.

Rhetorically Reading a Job Ad

The first step in getting a job is finding the one you want. This section will provide strategies for scanning job ads for key words and using these keywords and phrases to tailor descriptions of relevant experiences for your résumé and cover letter.

Where to Find a Job Ad

When looking for a job ad, it is important to consider reputable job searching sites, as well as the websites for particular companies for which you might like to work. Here are some links for reputable job searching sites:

- [http://www.indeed.com/](http://www.indeed.com/)
- [http://www.careerbuilder.com/](http://www.careerbuilder.com/)
- Employ-A-Bull

For information about these and other, industry specific job search sites, please visit this gallery of Job Search Websites ([http://www.pcmag.com/slideshow/story/294523/the-best-job-search-websites](http://www.pcmag.com/slideshow/story/294523/the-best-job-search-websites)).

What to Look for in a Job Ad

A job ad is the way companies let potential employees know what they need and what they want in an applicant. The job ad also provides important clues regarding how to talk about your experiences in a way that makes them attractive to the employer. Your job, then, as an applicant is to read the job ad critically and to develop a list of key words, phrases, and information related to the position.

Questions to Ask Yourself about Key Information

- Is there an application deadline?
- What is the title of the position?
- To whom should the application materials be addressed?
- Is this position specific to a particular department within the company?
- What are the requirements necessary to fill this position? (e.g., educational requirements, years of experience, particular knowledge, etc.)
- What are the responsibilities for this position? In other words, what will you, as an employee, do on a daily basis?
- Does the position require teamwork?
- Is this a management position?
- Does the job ad mention writing or communication skills as a part of the position?
- Are there any technical proficiencies required for this position?
- What adjectives does the job ad use to describe the ideal employee?

To answer the remaining questions, you will need to do some external research, such as visiting the company's website.

- How long has the company been operating?
- What is the company's mission statement?
- What kinds of products or services do they provide?
- What types of clients does the company serve?
Matching Qualifications to Job Ads

After analyzing your ad for key words, use this grid to organize these key words in the “What they want…” column according to categories—skills, experiences, education, qualities & values. Then reflect on your own skills, experiences, education, and qualities & values. How do they match up with the keywords you’ve identified? You probably won’t be able to fill in all the blanks in the “What I’ve got” column, but that’s okay.

<table>
<thead>
<tr>
<th>Skills (i.e., hardware/software skills, writing skills, building skills, etc)</th>
<th>What they want as outlined in the job ad. List from most important to least important</th>
<th>What I've got</th>
</tr>
</thead>
<tbody>
<tr>
<td>Example</td>
<td>Java and database administration</td>
<td>X class at USF that covered Java and X class at USF that covered database administration</td>
</tr>
<tr>
<td>Experiences (i.e., jobs, internships, volunteering, co-ops, etc)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Example</td>
<td>0-2 years experience in Civil Engineering</td>
<td>A co-op at Nederveld Associates, Inc.</td>
</tr>
<tr>
<td>Education (i.e., college, high school, seminars, workshops, etc)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Example</td>
<td>College education</td>
<td>B.S. from USF</td>
</tr>
<tr>
<td>Qualities and values (i.e., hardworking, good communicator, etc.)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Example</td>
<td>Someone who is responsible</td>
<td>Worked as a lifeguard</td>
</tr>
</tbody>
</table>
Establishing Your Professional Self: Résumé Writing

By Cassandra Branham and Megan McIntyre, University of South Florida

<table>
<thead>
<tr>
<th>Learning Objectives</th>
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</thead>
<tbody>
<tr>
<td>• Compose professional/workplace documents and oral presentations for multiple audiences and specific purposes using appropriate technologies</td>
</tr>
<tr>
<td>• Design documents, visuals, and data displays that are rhetorically effective, accessible and usable for specific audiences</td>
</tr>
<tr>
<td>• Apply/adapt professional writing conventions, including genre, tone, and style for particular writing situations</td>
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Compiling a résumé can feel like a daunting task. Just like essay writing, résumé creation works well as a process. Before worrying about the format of the résumé and where to place everything in a document, consider beginning by compiling an informal list of past and present work experience and education. Once you have a first draft, look at résumés in the field you are applying to, since every field has different standards and preferences. Remember: there are no one-size-fits-all résumés. The key to constructing a polished résumé is tailoring your experience to the job to which you're applying.

After you’ve read the job ad(s) and identified key skills and words/phrases (see McIntyre and Branham’s “Reading Job Ads”), you might consider creating an exhaustive list of possible content for each section of the résumé. Not all resumes will have all the sections below. In fact, depending on the amount of relevant experience and skills you have, you may eliminate more than one of these sections. However, maintaining a much longer list of possible content will allow you to more easily tailor your résumé to various positions.

Creating Your List

To begin, list each of the potential sections (the list of headings below is not exhaustive). The idea is to create headings that allow you to categorize and demonstrate your most relevant qualifications and experiences. For each of these categories, use bullet points with phrases rather than complete sentences to describe your experiences. Action verbs, such as communicated, completed, produced, etc., help to convey your participation. To get started, consider the following questions for each section:
<table>
<thead>
<tr>
<th>POTENTIAL SECTION HEADING</th>
<th>QUESTIONS TO ASK YOURSELF</th>
</tr>
</thead>
</table>
| OBJECTIVE                 | • What particular position am I seeking?  
                          | • How will my skills be appropriate for this particular position?  
                          | • What key words from the job ad might help me frame my skills for this position?  
                          |
|                           | *The key to writing a quality objective statement is specificity. Instead of writing: "To obtain an entry-level marketing position," try "To obtain an entry-level social media marketing position with a global media conglomerate that will allow me to benefit the company through my knowledge of social media promotions."

*Please note: not all resumes should include an objective. In fact, for many resume writers, the extra space taken up by the objective may be better used to expand other sections. Additionally, many employers do not expect to see objectives.* |

| SUMMARY OF QUALIFICATIONS | • What skills or experiences do I have that make me particularly well-suited for this position?  
                          | • If an employer reads no other section of my résumé, what do I want her to know about my qualifications?  
                          | • How can I quantify my experiences?  
                          | • What are my most impressive relevant skills and experiences?  
                          |
| EDUCATION                | • What university did I attend, and what degree(s) have I earned or am I pursuing?  
                          | • In what field is my degree?  
                          | • If I am still pursuing a degree, what is my expected month and year of graduation?  
                          | • What relevant course have I taken?  
                          | • What, if any, academic honors have I received?  
                          | • What relevant projects have I completed during my coursework (i.e., capstone projects, community service project, client-based projects, theses, etc.)?  
                          | • What is my GPA? (Please note: most resume writers only include GPAs of 3.0 or higher.)  

| WORK EXPERIENCE          | • Where and for how long have I worked?  
                          | • What were my job titles?  
                          | • What were my job duties?  
                          | • How can I frame these duties using key words from the job ad?  
                          | • What skills did I use and/or develop as part of this position (i.e., communication and writing skills, interpersonal skills, organization skills, etc.)?  
                          |
| LINGUISTIC SKILLS        | • Am I bilingual?  
                          | • Do I have intermediate proficiency in another language?  
                          |
| TECHNICAL SKILLS         | • Am I proficient in any software like Excel, PowerPoint, etc.?  
                          | • Do I know any coding languages?  
                          | • Can I use any field specific software?  
                          | • Am I experienced user of any field specific hardware?  
                          | • Do I have experience with collaborative writing spaces like Google Docs?  
                          |
| ACCOMPLISHMENTS          | • Have I won any academic, professional, or civic service awards?  
                          | • Have I been awarded any notable scholarships?  
                          | • Have I taken any summer study abroad trips?  
                          |
| ACTIVITIES (i.e., volunteer work, shadowing, leadership/membership in honors societies, etc.) | • Am I a member of any academic or professional organization(s)?  
                          | • Have I shadowed a professional in my desired profession?  
                          | • Have I volunteered for an organization or project? Have I organized an event?  

### Narrowing Your List

Once you’ve created your long list of experiences, you’ll have to decide how to narrow that list in order to create a concise, cohesive résumé. While it might be tempting to include all of your educational, employment, and extracurricular experiences on your résumé, including details that are not relevant to the position for which you are applying can often take attention away from your most relevant qualifications. In order to highlight your most impressive experiences, it is important to think critically about what the job you are targeting requires and how your experiences match up with those needs.

Undergraduate résumés are typically one full page in length. However, if you have a significant amount of experience in your field, your résumé might be longer than one full page. The rule of thumb is this: Limit your undergraduate résumé to one full page unless you can fill at least one
and a half full pages with relevant experiences. For many of you, this means you will need to eliminate some of your less relevant experiences.

You can narrow your list in three ways: by eliminating sections, by eliminating one or more experience within a section, or by cutting down your descriptions of one or more experiences.

**Eliminating Sections:** The quickest way to pare down your list is to eliminate sections that have no content. For example, if you only speak English, you don’t need a “Linguistic Skills” section. Additionally, if you have a section that is not relevant to a particular position, you might eliminate that section. For example, if you are applying for a position as a house painter and the job ad makes no mention of office or computer work, you might eliminate your “Technical Skills” section.

**Eliminating Experiences:** Another way to highlight your most relevant experience is by eliminating some experiences within a section. For example, if you are applying for a position as technical support specialist, and you were previously employed as a technical support specialist, a customer service representative, and a teacher at a daycare center, you might eliminate your position at the daycare from your résumé. Eliminating this experience from your résumé does not mean that this position did not teach you valuable things; however, your work as a technical support specialist and a customer service representative are more relevant to the position for which you are currently applying.

**Cutting Down Descriptions:** One final way to trim down your list of experiences is by cutting down descriptions. Typically, you will include descriptions in the form of bulleted lists that help you to describe your employment, volunteer, or educational experiences. However, although it is important to make sure that you reader knows how these experiences are relevant to the position for which you are now applying, it is not necessary to tell your reader everything about these experiences. For example, if you’re applying for a position as a customer service technician and you were previously employed as a cashier at a supermarket, rather than highlighting your job duties, such as ringing up groceries, you might focus on the customer service skills that you developed at this position, such as ensuring customer satisfaction. This enables you to trim down your list by focusing on skills rather than duties. Rather than providing an exhaustive list, you should aim to include 2-4 bullets for each experience that you are describing.

**Exercises**

1. Using only your most recent job (or, if you have never held a job, your most recent volunteer, internship, or academic experience that is related to your field of study), answer all of the questions from the above table that are relevant for the experience you have chosen. Don’t just write down the information that is obvious – try to list all of the potential items, related to your chosen experience, that you might include in a resume. Once you have compiled your list, trim it down to the three or four items that you would include on your resume, and write a brief paragraph explain your choices for inclusion and exclusion.
Even though technical fields favor conventional, “old-school” rules, many students, particularly those with extensive experience or a diverse background, stretch the limits slightly—and smartly—when creating their résumés. Creative format and content choices on your résumé certainly are permitted, as long as they enhance rather than detract from utility and appearance.

Creative Format Choices

Although format must remain accessible so the eye can readily scan the résumé both horizontally and vertically, creative format choices such as the following can enhance résumé content:

- **Jazzing up the heading.** If nowhere else, many writers give the heading of the résumé a bit more dazzle by using different fonts and sizes, perhaps even drawing a line or using an underscore beneath the heading that crosses the entire page.

- **Experimenting with tabs and margins.** By experimenting with format options for the entire document or for portions, you can change margin settings in order to get more information onto a particular line or onto the entire page. Informal tables and the use of tabs also economize on space. Still, aesthetically, avoid using less than one-inch margins at the page’s edge or more than three different indentations within a single line.

- **Providing visual emphasis.** Obviously, capitalization, boldface, underscore, and italics enhance both the appearance and hierarchy of information on the résumé. Beware, though, of graphic overkill, and keep in mind the intuitive hierarchy we employ as readers: Capitals and boldface typically represent important information while underscore and italics imply subordinate material.

- **Using a résumé template.** Résumé templates, which tend to offer a variety of fonts, preset fields for blocks of text, and even sample text itself, can certainly make a résumé look pretty. Keep in mind, however, that résumé templates do have constraints in format, and they often put categories into a different order than they would be on an undergraduate résumé. The resulting résumé may not be suited to the conventions of your field. If using a template, be sure you manage résumé content and appearance in a way that suits your circumstances.
Creating Special Sections

One way to elevate your résumé is through difference. Special sections highlighting specific traits that employers seek can make your résumé rise above the crowd. Typical approaches writers take include the following:

- **Creating a special section based on specialized experience.** Common special categories include “Leadership Experience,” “Military Service,” “Professional Qualifications,” “Communication Skills,” “Teaching Experience,” and “Research Experience.”

- **Taking a “skills” approach.** Drawing from the model typically used in graduate professional résumés, some writers open the body of the résumé with a “Skills Summary” or similarly titled section, detailing their skills and how they acquired them. A common strategy is to think both quantitatively (“Four years of experience programming computers using . . .”) and qualitatively (“Superior customer relations skills acquired through . . .”). The skills approach can go beyond simply one section, with other section titles including the word “skills” and work experience descriptions focusing on the skills acquired. The focus should be on outcomes and personal and professional attributes that would apply to any job performed, regardless of your field of study.

Exercises

1. Individually, locate three job ads for three different types of jobs for which you might consider applying in the future. Critically review the job ads and then go to your résumé. Think about how you might revise and/or re-organize your résumé to be attractive for each of the three jobs. For each job ad, write a brief paragraph that describes what you would change and/or add to your résumé for that particular job and why.
Quality Checking Your Résumé

By Joe Schall, National Institute for Occupational Safety and Health

Once your résumé is composed, it must be checked for quality. Three prominent issues that arise in a quality check are content, format, and computer-related problems.

Reconsidering Content

• Look over the résumé and be certain you have considered effective wording and strong candidate material within each category, as detailed in the previous pages of this manual.
• Consider accuracy and professionalism. If you simply volunteered at a position two hours per week, make sure your wording reflects this. Do your examples and wording reflect someone with a professional attitude, or are they too informal or potentially vague?
• Look over your job descriptions carefully. You should report exactly what you did and how it was valuable. Make sure we can see that your work was of use to someone and that performance was a concern.
• Browse for any major time gaps between jobs or other activities. If there are any, fill them in or otherwise eliminate them if possible.
• If you have one, review your “Activities” section with the idea of choosing an overall picture that reflects you and you alone. It should contain an objective listing of information—data and, perhaps, some description—unique to you. Your goal in this section is to make the reader want to meet you; to see you as an interesting and worthwhile person.
• Ask yourself: Have I only included content that I would feel comfortable discussing in an interview? At an on-site interview, your résumé might be on the interviewer’s desk. Expect that you could be quizzed specifically about any résumé content, and if you aren’t sure you could pass such a quiz, eliminate the content.

Reviewing Overall Format

• With few exceptions, an undergraduate résumé should be limited to one page. Those that go beyond one page should seek to fill two pages neatly so that the interviewer doesn’t end up looking at a large block of white space.
• Maintain at least one-inch margins on all four sides of the page, and spread your information out so that it is visually balanced. Do not be afraid of white space as a formatting tool.
• Be sure you have used identical margins and formatting for related information. Keep parallel information parallel in form. For instance, treat all major headings in the same way.
• Exploit punctuation marks—especially dashes, semicolons, and colons—to present your
material efficiently.

- Be line-conscious, especially horizontally, considering how much material can fit on a single line. If you are fighting for space, and you see that just one or two words are gobbling up an entire line unnecessarily, revise accordingly.
- Remember that readers look at your résumé left-to-right. Where logical, go to a new line for prominent new information. For instance, most writers put their degree name on a different line than their school name. Avoid line breaks that allow a single description of important information (e.g., your degree name or a course name) to spill onto more than one line.
- Present the final version of your résumé on durable white or off-white paper. Absolutely avoid bright colors, such as purple, green, or pink.

Making the Computer Your Ally

- Change font types or sizes if needed to fit the résumé to one page, but use just one or two fonts throughout—Times, Chicago, and Helvetica are popular résumé fonts—and go no lower than 10-point and no higher than 12-point for the bulk of the résumé text. Many writers do choose a larger or fancier font for their name at the top of the résumé, but be sure it’s readable and attractive.
- When lining up material, use tabs rather than space bars, otherwise, your output may appear differently than it does on the screen or print differently from one printer to the next.
- If you need a bit more space horizontally for just a line or two, see if you can “stretch” the relevant lines by resetting the margin on the ruler at the top of the page just for the lines in question.
- Absolutely work with a hard copy of your résumé. Do not trust that the way it looks to you on the computer screen will exactly match the output.
- Proofread with perfection in mind and have someone else proofread the résumé, too. Do not rely on the spell checker and certainly not on the grammar checker—neither will ever be capable of proofing a résumé effectively.
- If you need to submit the résumé by email to an employer, do not count on a Word version of the résumé looking the same on someone else’s computer as it does on yours—fonts may not translate perfectly, tabbed material may be misaligned, and line length may be compromised. The safest bet is to convert the résumé to a pdf, check the resulting .pdf file to be sure it’s exactly how you want it to look, and then email this.

As a final quality check, seek collective agreement that your résumé is perfect. Other readers—your peers, professors, parents (gasp!), and the staff at your university’s Career Center—can add fresh perspectives (and even corrections) to your résumé. You get the last word, of course, but be sure that more than one other person agrees that you have presented yourself in the best possible way on paper. It pays off.

Exercises

Swap résumés with one of your classmates. Provide feedback for your classmate’s résumé about the following things:

Content:
- Are the job descriptions written professionally and with detailed descriptions? Why or why not? What content suggestions/revisions can you offer your classmate?
- Do the job descriptions provide evidence for how the job was valuable to the professional development of the writer? Why or why not? What content suggestions/revisions can you offer your classmate?

Format:
- Is the résumé in question formatted professionally and consistently? Why or why not? What formatting suggestions can you offer your classmate?
- Do you find the résumé easy to read? Why or why not? What formatting suggestions can you offer your classmate?
Writing Cover Letters
By Joe Schall, National Institute for Occupational Safety and Health

Learning Objectives

- Compose professional/workplace documents and oral presentations for multiple audiences and specific purposes using appropriate technologies
- Design documents, visuals, and data displays that are rhetorically effective, accessible and usable for specific audiences
- Apply/adapt professional writing conventions, including genre, tone, and style for particular writing situations

When reading cover letters, the key benchmark I use is simple: Do I get to know both the person and the professional? As we read a cover letter, we should have a sense that no other candidate could have written this particular document in this particular way. Hence, we respect and honor the individual.

In conversation, the term "cover letter" is used loosely to mean any professional letter that you write in an attempt to get a job, with the term "cover" denoting that the letter is usually a "cover piece" designed to introduce and accompany your résumé. Thus, too many writers think of the cover letter as mere mechanical introductory fluff—disposable goods—when in fact it can be more important than your résumé.

The best tip that I have heard on cover letter writing is that the letters is for the audience, not for you. Certainly you are selling yourself, but you do that best by molding your skills to what an employer needs and by knowing all that you can about your audience. This tells you that you should visit a company's website, read the company literature, and have a specific person's name and title to write to (you can always request this by phone or email before you write). In sum, know what your audience is interested in and how you might fit into a company's plans, not the other way around. Unless an employer instructs you otherwise, always include a cover letter with your resume as you apply for a job.

Tone: Making it Sound Good

- The proper tone for the cover letter is one of an informed, straightforward, courteous, relaxed, literate writer.
- Use "I" comfortably as a sentence subject, but avoid being too informal—overusing contractions or jargon could make you appear unprofessional.
- Avoid being too cocky, aggressive, idealistic, or unrealistic; come off as mature, self-aware, and confident.

Appearance and Mechanics: Making it Look Good

- Limit cover letters to one page, and type them using single-spaced or 1.5-spaced typing, with about one-inch margins on all sides of the page.
- Skip lines between paragraphs.
- Favor short paragraphs over long ones.
- Use highly readable, tight, fonts, such as Helvetica or Times, and point sizes no larger than 12 and no smaller than 10.
- Spell check, then proofread the hard copy carefully. Present the final version of the letter on durable white or off-white paper.
- Mail your letter and resume flat in a large envelope rather than folded in a small one. That way they will be easier to read and photocopy.

The Heading and Greeting: Following the Formats

- At the top right or left corner of the page, type your address, your phone number, your e-mail address, and the date. Below that, at the left margin, put the name, title, and address of the person receiving the letter.
- Skip a line or two, then type "Dear," the person's title (Dr., Ms., Mr.), name, and a colon.
- If possible, find out the proper title, spelling, and gender of the receiver of the letter (all it usually takes is a phone call or a little online searching). If you cannot be certain of the recipient's gender, it is acceptable to use both the first and last name (i.e., "Dear Jan Morris"). If no name is available, use a logical title such as "Dear Human Resources Representative.
- Greetings such as "Dear Sir or Madam" and "To Whom it May Concern" are old-fashioned—some even find them offensive—and should be avoided.

The Opening Paragraph: Showcasing Your Homework

- Ideally, open with a reference to how you derived knowledge of the company or position.
- If possible, provide context by some artful name dropping ("Ms. Judith Sowers, a Quality Control Specialist in your Meredith plant, informs me that you are seeking . . ."). Otherwise, simply be forthright about why you are writing the letter ("I am writing to you because . . .").
- Include particulars about the company's activities and vision—prove that you have done your homework and know something about the company's products and mission. Even quote a mission statement if you can.
- Establish your own professional context by naming your major and school.

The Body Paragraphs: Selling your Skills

- One paragraph may suffice here, but use more if necessary, especially if you have several different skills or experiences to sell. Stick to one topic per paragraph.
- Through concrete examples, provide evidence of your work ethic and success—cite courses, co-ops, papers, projects, theses, or internships you have completed. Make your examples both quantitative and qualitative. Some writers use a bulleted list to introduce narrative examples of their skills. Some even provide URLs for their home pages or other web pages they helped to create.
• Introduce your resume (“As the enclosed resume shows . . .”) and interpret it for your audience rather than simply repeat its details. Apply your education, work experience, and activities directly to the job, proving that you are a highly capable candidate.

The Closing Paragraph and Signoff: Exiting Gracefully
• Keep your closing short and simple. Do not waste time. Be gracious and sincere, not falsely flattering or pushy. Respectfully indicate your desire for further action, reminding the company of your availability.
• Remembering that a company could try to call you over a break or during the summer, indicate relevant phone numbers right in the text. Provide your e-mail address as well.
• Under the final paragraph, skip a line or two, then, directly under your heading address, type “Sincerely,” then handwrite and type your name beneath.
• Indicate that a resume is included along with the letter by typing the word “Enclosure” at the left margin near the bottom of the page.

Exercises
1. Find a company online that employs people who are working in your field of study. Visit the company’s website and identify the company’s mission statement and/or core values. Now, imagine that you are applying for a position with this company, and compose a draft of the introductory paragraph to your cover letter. (Remember to include the information discussed above.)
2. Using the job ad that you are working with in this course, list your 3-4 most relevant experiences. Now, how can you group these experiences into paragraphs? If all of the experiences you identified demonstrate the same skill, can you eliminate any of them from your discussion? Remember, each paragraph should discuss one topic that demonstrates your qualifications for the job being advertised, but you might discuss several experiences related to that topic.
Tips for Writing a Cover Letter

By Cassandra Branham and Megan McIntyre, University of South Florida

Learning Objectives

- Compose professional/workplace documents and oral presentations for multiple audiences and specific purposes using appropriate technologies
- Apply/adapt professional writing conventions, including genre, tone, and style for particular writing situations

When applying for jobs, a well-written cover letter is just as important as a well-written résumé. While the résumé is designed to provide an overview of your relevant skills and qualifications, the cover letter is your opportunity to discuss relevant experiences, connect those experiences to qualities and qualifications from the job ad, and to display your personality to your reader. In other words, the cover letter is your chance to humanize yourself to your reader and to give the reader a sense of who you are and why you’re uniquely qualified for a particular position.

**DOs**

**TAILOR YOUR LETTER TO THE JOB AND COMPANY** by making explicit connections between the language and values articulated in the job ad and/or on the company’s website and your experience and qualifications.

**BEGIN WITH AN INTRODUCTORY PARAGRAPH THAT CONTEXTUALIZES YOUR LETTER** by describing the job you are applying for, indicating where you saw the ad, indicating your interest in being considered for the position, and previewing the credentials you will discuss.

**INCLUDE ONE OR TWO BODY PARAGRAPHS THAT HIGHLIGHT YOUR MOST RELEVANT SKILLS AND EXPERIENCES.** One paragraph may be enough, but use more if necessary, particularly if you want to highlight various skills and experiences. Discuss one topic per paragraph.

**SHOW, DON’T TELL.** Use both qualitative and quantitative examples of your experiences and qualifications. Provide concrete examples by referring to specific courses, research projects, internships, or prior work experience.

**DON’Ts**

**SEND A GENERIC LETTER** that includes no specific information about the company or position.

**BEGIN WITH YOUR QUALIFICATIONS.** It’s important to establish what job you’re applying for and that you know something about the company before describing yourself.

**CREATE A NARRATIVE RÉSUMÉ.** Your attached resume will tell your reader what you’ve done. The cover letter is an opportunity to make connections between your experiences and qualifications for the position.

**JUST TELL.** Anyone can write, “I am an excellent leader.” However, describing an experience that allows you to show the reader that you are an excellent leader is much more effective.
<table>
<thead>
<tr>
<th>CONCLUDE BY EXPRESSING INTEREST in being contacted for an interview. Be sure to also include your contact information in your conclusion, and remember to thank the employer for his or her time and consideration.</th>
<th>FORGET TO SHOW APPRECIATION to the reader for his or her time and effort in considering your application materials.</th>
</tr>
</thead>
<tbody>
<tr>
<td>ESTABLISH ETHOS THROUGH A PROFESSIONAL TONE. Although you are writing in first-person, avoid being too informal. Avoid contractions and jargon, and strive to create a mature, self-aware, and confident tone.</td>
<td>ADOPT EITHER AN ARROGANT OR SELF-DEPRICATING TONE. When presenting your qualifications, it is important to show confidence. However, it is also important not to sound cocky or aggressive. On the other hand, it is also important not to sound insecure.</td>
</tr>
<tr>
<td>FOLLOW CONVENTIONS OF THE FORMAL BUSINESS LETTER. Use a standard font and font-size, keep the letter to one page, and use appropriate formatting conventions for business letters.</td>
<td>FORMAT YOUR COVER LETTER LIKE AN EMAIL OR A PERSONAL LETTER. Don’t use a unique font or include color in your cover letter. Don’t write a cover letter that is longer than one page.</td>
</tr>
<tr>
<td>PROOFREAD YOUR LETTER SO THAT IT IS GRAMMATICALLY PERFECT. Hiring managers receive many résumés. Often, regardless of the content of your résumé, a typo or grammatical error can quickly eliminate you from the pool of applicants.</td>
<td>THINK THAT A COVER LETTER IS NOT NECESSARY. Even if a job ad does not specifically request a cover letter, most professional positions expect them.</td>
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Establishing a Web Presence
By Megan McIntyre, University of South Florida

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The web, and social media in particular, can present a number of potential pitfalls for job seekers; however, the web also features a number of potentially beneficial spaces. 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.

<table>
<thead>
<tr>
<th>Online Space</th>
<th>How is it helpful?</th>
<th>What kinds of information should you provide?</th>
<th>How might you use it to connect with potential employers?</th>
</tr>
</thead>
</table>
| 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. | • 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 | 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. |
Exercises

1. Do a search on either LinkedIn or Twitter for a well-known company in your field. What types of information does the company’s profile provide? How might you use this information to create a professional profile in line with the company’s needs and values?

2. Using wordpress.com, or a similar site, find the professional website of someone who is in your field of study. (Do this by searching for terms relevant in your field.) This person can be a student, such as yourself, or a professional working in the field. Take some time to examine this individual’s Wordpress (or other venue) site – what sort of information does this person provide? Does the presented content help the author develop a professional ethos? Why or why not?
Taking Control: Managing Your Online Identity for the Job Search

By Daniel Ruefman, University of Wisconsin – Stout

Learning Objective

- Compose professional/workplace documents and oral presentations for multiple audiences and specific purposes using appropriate technologies
- Design documents, visuals, and data displays that are rhetorically effective, accessible and usable for specific audiences

Background

In 2008, while working as a career counselor, a student came into my office to discuss her difficulty securing an internship prior to graduation. On paper, she was a phenomenal candidate—3.8 GPA, active in student government, successful athlete, and in possession of solid letters of recommendation from her instructors, coaches, and past employers. Despite her many strengths, she had interviewed with seven prospective employers throughout her junior year but was unable to secure the internship that was required by her academic program. Perplexed, I called up a recruiter I knew from one of the companies she interviewed with and asked him to describe the hiring process for internships. In addition to the basics (i.e. phone interview, in-person interview(s), and reference checks), his company had begun e-screening applicants; he explained that the top candidates were ranked following the in-person interviews and were subsequently vetted by Human Resources, which included an examination of public social media profiles and a general search of popular search engines. The student and I then conducted our own searches for her and quickly identified her problem. Although this student was a qualified candidate, negative information online created a professional roadblock.

Today, there remains little doubt that social media has had a huge impact on the way business is conducted. Worldwide, more than 800 million users log onto social media sites (like Facebook and Twitter) every month, including 7.5 million college students in the United States alone (Maxwell, 2012; Peluchette & Karl, 2010). Unbeknownst to many of these users, employers have begun reviewing social media profiles when screening candidates for employment. A recent CareerBuilder survey suggested that approximately 45% of U.S. employers are currently accessing social media sites to research applicants. Furthermore, the survey also indicated that 35% of respondents reported dismissing candidates based upon information provided in their social media profiles (“One-in-Four,” 2009). While employers seem to be increasingly aware of what is going on in the digital world, new evidence suggests that college students are not as concerned with their own online activities, with more than 50% of sampled college students posting content deemed “inappropriate” by employers on their social media pages; this content often includes evidence of underage alcohol abuse, semi-nude photos, and profanity directed at peers, teachers, and current employers (Peluchette & Karl, 2010). If you are a college student, you are preparing to enter one of the most competitive and hostile job markets in U.S. history, and as such, you should be aware of the real-world consequences of your virtual activities. Often, you may post information online that is intended for one audience, unaware of the effect that this content has on unintended viewers, but a simple three-step process of reflection, revision, and reinvention could help to mitigate these consequences.

Managing Your Identity: Three-Step Strategy

An evaluation of online presence should be a regular part of your job search preparation. Although it is difficult to completely revamp your entire online identity, there are several steps that can bolster your virtual curb appeal for prospective employers. The most effective strategy for doing so actually involves a three-step process of reflection, revision, and reinvention.

Reflection

To begin overhauling your online presence, a period of reflection is necessary to honestly evaluate your personal values, beliefs, and activities to ensure that they are compatible with your professional aims. Although this may prove to be a challenging process, one of the best ways to start out is to examine the impact online activities have on others. For example, an online search of the keywords “denied degree social media” will ultimately lead you to the story of Stacy Snyder, a woman who was denied a teaching degree from Millersville University of Pennsylvania due (at least in part) to her online activities via MySpace (Krebbs 2008). Likewise, a search for the terms “fired over Facebook remarks” will return the story of Wisconsin Department of Transportation Executive, Steven Krieser, detailing how he was fired after posting Facebook comments about illegal immigration (Richmond 2013). There are many cases where the impact of seemingly innocuous online activities can affect your employability in the real world. Ultimately, the decision to include or omit any content on social media must be made by you as an individual, but it is vital to recognize that those decisions have consequences.

Revision

After identifying the areas where your online presence could be improved, try to make revisions where possible. The focus of this process should remain on your social media presence(s). Take care to delete inflammatory comments, questionable photos, and personal information that may alienate members of your prospective audience. At times, you may notice that your posts may not be as concerning as the comments posted by your friends. During this process, you will not only be revising your individual persona, but you may also need to consider who your audience will be during the hiring process. To begin overhauling your online presence, a period of reflection is necessary to honestly evaluate your personal values, beliefs, and activities to ensure that they are compatible with your professional aims.
Privacy settings are another area that you should understand when revising your social media presence. The ongoing commodification of social media means that it is in the best interest of social media sites to create open, transparent networks. Because of this motivation, site administrators constantly change default settings with system updates, which users must opt out of. For example, in 2010, you may have changed your privacy settings to the highest level possible at the time, only to realize that when your profile migrated to timeline format, friends of your friends can now access your content, as well. This means that a profile that you once thought hidden can now be accessed by an employer who has friended your classmate who had an internship with their organization last summer. Similarly, posts and pages that you like on social media are also, by default, visible to the public, and those likes tell a lot about who you are. The only way to know for sure who can see what information is to continually monitor your privacy settings to ensure that they have not been changed by system administrators.

Reinvention

After revising your social media presence, it is time to address the information that is digitally archived by Internet search engines. On some occasions, questionable content can be removed by contacting individual website administrators and making a simple request; however, as most information online is virtually impossible to remove, a more proactive strategy can help you make that information much less noticeable.

Understanding how search engines rank results is important to devising a strategy that works best for you. Whenever search engine is used, top ranked results will appear fairly similar, as they are ranked according to similar criteria. Although your name may be mentioned a million times online, not all sources are created equal. Search engines will organize findings according to relevance and popularity. Webpages that receive a significant amount of traffic or that are linked to many other sites will appear earlier in the results than less prominent pages. Public profiles on popular social media sites (e.g. Facebook, Twitter, Linkedin, etc.) will usually appear earlier in searches for this reason. In addition to popularity, sites will also be ranked according to their relevance. This means that webpages that contain specific keywords, use the person's name in the URL, or that are more recent will often appear earlier in the results than older, or more fragmented information. To use these search engines to your advantage, consider creating your own professional webpage or blog that integrates your name into the URL. In doing this, search engines will automatically register that website as being more relevant than other search results. As these pages gravitate to the top of your search results, older, less relevant, and less appealing entries will typically register that website as being more relevant than other search results. As these pages gravitate to the top of your search results, older, less relevant, and less appealing entries will drop further down the list, making them less likely to draw an employer's attention. As you build an online persona to connect more effectively with prospective employers, proving that you have the skills, knowledge, and identity to be successful with any organization.

Finally, link digital spaces that you occupy to create a more complete image of yourself online. Including links to your accounts on Facebook, Twitter, and Linkedin will ensure that your employer is more easily able to navigate and evaluate your online identity. Often, when conducting personnel searches, employers may locate profiles from different people with similar names. Connecting professional spaces makes it easy for an employer to navigate profiles, ensuring that your profile is not misidentified. These mix ups can occur; organizing your information effectively online ensures that you do not pay the price for someone else’s content.

Conclusion

It is important to recognize that, in today’s digital age, we all are living an increasingly public existence, whether we want to or not. Some may choose to avoid a social media presence altogether, but evasion may not be the answer as corporate entities are using digital media to more effectively connect with their target demographics. Your total absence may imply that you are not tech savvy or are out of touch with current trends. Likewise, overuse or unprofessional use of this same media can paint you as a liability for an organization looking to maintain a certain image in both the digital and real worlds. Reflecting upon the digital spaces you currently occupy, revising content, and creating new, more professional spaces will hone your online persona to connect more effectively with prospective employers, proving that you have the skills, knowledge, and identity to be successful with any organization.

References


Avoid (unless directly relevant to the industry in which you plan on working):

- personal hobbies (hunting, snowmobiling, recreational sports, etc.),
- personal or family details (birthdate, siblings, hometown, religious affiliation, etc.), and
- outdated information (high school activities)

Consider including the following on your professional blog or website:

- a professional profile that outlines your professional goals and objectives,
- an electronic portfolio that showcases academic or internship projects, and
- an up-to-date resume that contextualizes your achievements, skills, and experience.
LinkedIn: Are You Making the Key Connections?

By Laura Palmer, Southern Polytechnic State University

Learning Objectives

- Compose professional/workplace documents and oral presentations for multiple audiences and specific purposes using appropriate technologies
- Design documents, visuals, and data displays that are rhetorically effective, accessible and usable for specific audiences
- Apply/adapt professional writing conventions, including genre, tone, and style for particular writing situations

LinkedIn is a social networking site (SNS) used for making valuable career connections and finding that critical first job. As a student, it's important to have a LinkedIn profile that highlights the expertise you bring to a potential employer. Your degree, the courses you took, major projects completed, and your college jobs and affiliations all combine to create a picture of who you are and what you can do.

However, LinkedIn can be a bit disconcerting. Its pages show professionals with lists of jobs and accomplishments that can be intimidating. Almost no one with a LinkedIn profile page is a person the average student can relate to. The whole LinkedIn thing, students tell me, is off-putting to anyone who's still in college.

As well, students have told me they don't see a lot of value in LinkedIn. Nothing happens with their profiles—it's a digital dead zone. The payoff for investing time and effort with LinkedIn doesn't seem to be there, so students put up a bare-bones profile for a class, and then proceed to ignore it for the next several years. However, LinkedIn isn't an SNS you should ignore. You've got a powerful partner in LinkedIn when it comes to your career. But, that partner can only work for you if you know how to leverage its powers. The purpose of this piece is just that—it's about how to harness LinkedIn's power and take advantage of what this SNS can do for you and your career. We'll start with your photograph and then move into the writing.

Your Photo: What They'll See First

Right away, you need to get a professional headshot. This photo's only job is to convey your ethos as an individual preparing to enter the workforce. Those selfies you've taken with your phone or your webcam aren't what you need here.

Professional headshots are a genre: They have conventions. If you look at a headshot gallery on a professional photographer's site (http://www.phoenixcorporatephotography.com/corporate-headshots.html) you'll see the photos share similar characteristics. The backgrounds are a plain screen or have some architectural features in the distance. To make these photos more interesting and to showcase the subject's personality, the photographer uses lighting, position-
An algorithm is simply a set of steps used to solve a problem. For a recruiter searching on LinkedIn, the “problem” they have is finding a person with the right qualifications for the job. LinkedIn’s goal for their algorithms is to get relevant results to the searcher. So, LinkedIn uses its own proprietary algorithms to rank and order the results when someone searches on the site (LinkedIn, 2014).

Take a look at Figure 1. There are countless ways a recruiter can define who they’re looking for—from very broadly to very narrowly. It seems daunting, if not impossible, to be found on LinkedIn, but you can maximize your chances through SEO (search engine optimization). Good SEO can make you visible to LinkedIn’s algorithms. That means, when a recruiter does a search, you’ll pop up in her results.

**LinkedIn’s Major Sections**

Your LinkedIn profile needs words to take advantage of SEO. First, it needs words in the form of a compelling and interesting description. Next, it needs keywords that would match what a recruiter in your discipline would enter into LinkedIn’s search functions. At their most basic, keywords are terms used during searches. When you type “college papers about whales” into Google, you’ve used keywords to tell Google what you want to find.

So, how do you make LinkedIn work for you? You need to write text that makes good use of the keywords a prospective employer would use. Your LinkedIn profile has several major sections, so we’ll go through each one and look at what you should do and where you’ll need to leverage your writing skills.

**Name, Photo, and Profile URL**

At the top of the profile, put in your name, what city you live in, and upload your professional headshot. Here’s a must-do for this section: Edit your contact information. If you want to get that first job, people need to contact you. You can include your email address, Twitter handle, or link a visitor to your portfolio website. Be careful with your online privacy when it comes to your phone numbers, your address, or other personal information. You may want to leave those sections blank.

Next, create your custom public profile URL for LinkedIn by clicking Edit at the very bottom of the Edit Contact Info screen. It’s not immediately obvious how to make this change, but when you click edit, you’ll be taken to a display view of your profile. Next, you’ll need to:

- Scroll to the right-hand side of the Public Profile page
- Scroll down until you see Your public profile URL
- Click Customize your public profile URL
- Update your profile regularly. Add new classes, projects or jobs right away. When you update your profile, your network of connections receives a notice about your changes.
- Join various LinkedIn groups. Your activity on the site is also important (LinkedIn, 2014). For you that means you should start to chat on various groups, like what people post, and show that you’re engaged with the LinkedIn community.
- Connect with other students and professionals. Start small with your connections by asking other students to connect with you. When you get more comfortable with connecting, expand your horizons to professionals in your field.
You need to write several paragraphs about yourself, your goals, the career you're looking for, and your education. Employers want to know what you can do for them, so tell them in these paragraphs. Don't be afraid of explaining what you're capable of in your summary. In writing, it's common to talk about appeals to the reader, but remember that your first "reader" is the LinkedIn search algorithm. Before you start writing, you'll need to consider the keywords you'll use for your LinkedIn profile. Write down keywords you see as relevant to your profession, and then do a search on LinkedIn. LinkedIn will return three types of information: jobs, people, and related groups. Right now, you're interested in jobs and people—we'll cover groups later.

Look at several of the job postings and people profiles LinkedIn gave you in response to your search. If you see keywords you hadn't thought of, write them down. When you start to draft your summary, you'll want to work these words into your writing.

With keywords in hand, it's time to tell your story.Compose three or four paragraphs. Don't follow what you've learned about résumé creation; this isn't the place to keep it brief or use bullet points. You're trying to attract a search engine first and foremost. The human will follow once what you've learned about résumé creation; this isn't the place to keep it brief or use bullet points. You're trying to attract a search engine first and foremost. The human will follow once your summary, you'll want to work these words into your writing.

Before you start, though, here's a word of caution directly from LinkedIn: “More keywords aren't always better” (LinkedIn, 2014). LinkedIn doesn't want you to stuff your profile with irrelevant keywords just to get people to look at your profile. If you do that, you'll fall out of favor with the algorithms and fewer people will see your profile.

Spelling and grammar count more than you can imagine here. If you're weak in those areas, compose in your word processor first, and then run the spell/grammar check. Next, have a friend or your instructor review your summary sections to ensure they read well and sound professional. You can't be too careful here, as many potential employers will dismiss you on the spot for sloppy writing and bad grammar.

Throughout LinkedIn there are places to include samples of your work as either links to URLs or uploaded files. Are you blogging for a class? Do you have an online capstone web portfolio of your work? Make sure you include the URL link to these. You can also upload individual files. Did your lab report receive an “A”? PDF the file and upload it. Take advantage of the link and upload features, shown in Figure 4, in your Summary section and in other sections in your profile.

Summary Section

Now, we're getting to the words part of your profile. Again, LinkedIn isn't a repeat of your print-ed résumé; LinkedIn is your digital introduction to career professionals in your field. Online, this is how people meet you for the first time; it's vital you make a good impression and introduce yourself through a carefully crafted narrative.

You need to write several paragraphs about yourself, your goals, the career you're looking for, and your education. Employers want to know what you can do for them, so tell them in these paragraphs. Don't be afraid of explaining what you're capable of in your summary.

In writing, it's common to talk about appeals to the reader, but remember that your first "reader" is the LinkedIn search algorithm. Before you start writing, you'll need to consider the keywords you'll use for your LinkedIn profile. Write down keywords you see as relevant to your profession, and then do a search on LinkedIn. LinkedIn will return three types of information: jobs, people, and related groups. Right now, you're interested in jobs and people—we'll cover groups later.

Look at several of the job postings and people profiles LinkedIn gave you in response to your search. If you see keywords you hadn't thought of, write them down. When you start to draft your summary, you'll want to work these words into your writing.

With keywords in hand, it's time to tell your story. Compose three or four paragraphs. Don't follow what you've learned about résumé creation; this isn't the place to keep it brief or use bullet points. You're trying to attract a search engine first and foremost. The human will follow once your profile is findable.
Publications
If you’re in a writing-based major like technical communication, professional/creative writing, journalism, and beyond, you may have published your work. The same holds true if you wrote for your student newspaper or co-authored with a professor.

When you’re filling out the Publications section, make sure you include the full title of the piece you wrote, where it appeared, the date, and a brief description of the contents. If the piece you wrote (or co-wrote) is online, include a link via the URL. If it was in print, include a PDF. Never miss an opportunity to showcase your work and include paragraphs with keywords that the search algorithms can find.

Skills and Endorsements
Are you good with a particular software or laboratory test? This is the place to list those skills. Once you add some skills (and some contacts), you’ll see other people endorse you for those skills. If someone does endorse you for a skill, return the favor.

Projects
This category is another excellent opportunity to highlight what you’ve learned and what you can do. Projects allow you to include your team members, define the title and the date of the project, and provide a description. Do I need to remind you about keywords again? If the project relates to your professional goals, remember to add relevant keywords to the text.

Education
This may surprise you, but students often have a difficult time framing their education for LinkedIn. Most students include the name of the university and the title of the degree; then, they stop. Yet, there’s no reason to give a reader (or a search algorithm) so little information.

LinkedIn provides you with several fields to highlight what you’ve done in college, as Figure 5 makes clear. Make sure you take the time to fill those fields out. Include any special activities and/or societies you’ve been involved with in the appropriate field. Employers like to see well-rounded people when they’re looking to hire.

And, describe your degree in detail—with words that the search algorithm will use. Don’t assume everybody knows what’s covered in a degree. They don’t. Educate your reader about your degree, what you’ve learned, and what you can offer an employer. Don’t be shy about using the Description field to discuss any assignments or other activities from classes that would be relevant to the job you want. Like the Summary section, there’s room for several paragraphs here.

A Word on Ordering Your Sections
You can move, via dragging, the major sections in your LinkedIn profile per Figure 6. Start with your Summary section, then consider the logical order for other sections. For many of you, Education, Courses, and Projects may be the correct order. Perhaps it’s Education, Courses, and Experience. No matter the order, think about what will work to your advantage. Just remember
that what you put first is what your reader will see first.

Figure 6. Use the black arrow to rearrange profile sections.

What Happens Next?

Once you have a complete and robust profile, you’ll start to see people looking at your profile. My students have said it feels a bit creepy to see strangers reviewing what you can do, but this is how LinkedIn works. Some of these same strangers may ask to connect with you—many of them may be recruiters, hiring managers, or professionals in your field. Make sure you connect right away. Several of my students received connection requests shortly after we finished our LinkedIn assignment. The class was even more amazed to find people were messaging them to discuss their qualifications and upcoming graduation dates. Even if you’re a year or more away from graduating, recruiters may want to follow your progress. When you’re getting close to graduating, don’t be surprised if several people reach out to ask about interviewing you.

Now that you have a rich and interesting LinkedIn profile, you have to maintain it. Here’s what you need to do:

• **Update your profile regularly.** Add new classes, projects or jobs right away. When you update your profile, your network of connections receives a notice about your changes.
• **Join various LinkedIn groups.** Your activity on the site is also important (LinkedIn, 2014). For you that means you should start to chat on various groups, “Like” what members post, and demonstrate via your own original posts that you’re engaged with the LinkedIn community.
• **Connect with other students and professionals.** Start small with your connections by asking other students to connect with you. When you get more comfortable with connecting, expand your horizons to professionals in your field.

Remember, a LinkedIn profile is always a work in progress. When you land that first job, you’ll need to update your profile, emphasize your new position, and more. Now’s the time, however, to get started on this important step towards finding your career through the power of social media and online connections.

Exercises

1. Sign up for a LinkedIn account or, if you already have an account, log in. Now, use LinkedIn’s search function to search for information about your intended career. For example, if your goal is to get a job as a registered nurse after graduation, type the phrase “registered nurse” into the search function. Take a look at a few of the top profiles that are returned to you, and analyze these profiles for similarities. Do these profiles make use of the sections discussed above? Are these users active in the LinkedIn community? Write a short paragraph reporting your findings, and then write a short paragraph explaining how you might adopt some of these users’ strategies for your own LinkedIn profile.

2. Enter the same search term that you used in exercise 1 into LinkedIn again, but this time, look for groups and/or organizations related to this term. How many groups are there available for you to join? Find at least three groups that seem interesting to you, and briefly report on their content. For example, who belongs to this group? What type of information is shared in this group? What is the purpose of the group?

References

Chapter 4: Digital Literacies

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What are New Literacies?

By Kyle Stedman; University of South Florida

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<th>Learning Objectives</th>
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<td>• Apply/adapt professional writing conventions, including genre, tone, and style for particular writing situations</td>
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<td>• Develop information literacy strategies</td>
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Something seems wrong

A few days ago, I tweeted something that wasn’t particularly funny, but I got this response:

I don’t know anyone named Cory Folse, and I don’t know who this @jokesallnight person is, either. So I ignored the tweet, kind of glad I had made someone happy, but kind of confused. But then a couple of days ago, I was still thinking about this weird tweet, so I decided to see who this Cory Folse person was. I clicked on his user name, which showed me a list of his most recent tweets, with the most recent ones on the top:

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1 On Twitter, anything starting with an @ represents a user account. So this tweet was written by Cory Folse, who tweets from the account @corsett445. In the text of his tweet, he mentioned @kstedman (me!) and some other user called @jokesallnight. Because he mentioned our user names, Cory’s tweet will appear as a “mention” when we log into Twitter. It’s much like when someone “tags” you on Facebook.
the forwarding chain, and others that tell me about all the stupid luxuries Democrats or travel agents have insisted on when flying. Those who are email literate recognize the signs that these things probably aren't true (and a quick search on snopes.com usually clears up any lingering doubts about what's a scam and what isn't). There's even a whole website, literallyunbelievable.org, chronicling people who read the fake news on theonion.com and think it's real.

What's wrong with these email-forwarders and fake-news-believers? I suggest that they're not literate in the ways of new media. They saw something that would be fishy to many readers who are better acquainted with the usual moves made in those contexts, but no alarms went off in their minds.

This article is an exploration of new media literacies, with the end goals of reminding you not to be a sucker who falls for illiterate silliness and encouraging you to rely on your new media literacies when composing with digital technology. To get there, I want us to think about why we use the word literacy to discuss these online issues, how literacy has been expanded in other contexts, and what new media has to do with it all.

The Traditional Model of Literacy

We usually think of a particular skill when we hear the word literacy—knowing how to read. When students can barely read, teachers complain, "They're barely literate!" When politicians say, "Kids today are illiterate!" they mean that the kids can't read—or perhaps more subtly, that they can't read very well. That is, they don't understand the complexities and nuances that practiced readers see in a big splattering of words on a page or screen.

The politician's claim reminds us of another aspect of literacy that's usually tied to the reading angle: the ability to write. When politicians rile up crowds by calling kids illiterate, they often mean, "Kids today don't understand complex reading, and they can't produce complex writing, either." So implied in the skill of literacy is also the ability to write. This makes sense; if I can't make sense of a piece of writing's purpose, organization, figures of speech, and rhetorical moves, I probably can't create a piece of writing that uses those aspects of writing in sophisticated ways.

And as you can hear from my examples of the teacher and the politician, literacy is often a word that shows up when people want to describe something that people don't have. I'm unlikely to be praised for my literacy when I accurately summarize a tough essay in class, and I'm unlikely to read a particularly nice magazine article and say to the author, "Oh, you were so particularly literate in that piece!" Literacy is usually used more as a baseline for competence, something that we ought to have but that stands out most noticeably when it's not there, like the space where a demolished building used to be, or when we see a person not wearing any pants.

New Models of Literacy

Why go into so much detail about the traditional model of literacy—the skill of knowing how to read? When students can barely read, teachers complain, "They're barely literate!" When politicians say, "Kids today are illiterate!" they mean that the kids can't read—or perhaps more subtly, that they can't read very well. That is, they don't understand the complexities and nuances that practiced readers see in a big splattering of words on a page or screen.

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New Models of Literacy

Why go into so much detail about the traditional model of literacy—the skill of knowing how to effectively read and write? Because when literacy is applied to new contexts—as it is all the time—it often retains the baggage of its traditional usage. Even in these new contexts, literacy is often used to describe a lack that we wish were filled, just as when we describe people who
can't read. Literacy is also often tied to effective reading and effective writing (though sometimes reading and writing are expanded to different forms of understanding and acting). For example, I described myself as “literate” at the beginning of this piece because I saw through the Twitter spammer’s tricks. That’s because I was separating myself from the “illiterate” people who fall for his spam, and because I wanted to emphasize that communicating well on Twitter is tied both to reading and writing tweets effectively.

A quick Google search for “literacy” shows me various other ways that people use the word:

- Financial literacy: the ability to understand complex financial information, and the ability to act wisely on that financial know-how
- Information literacy: the ability to find the right information for a given task, and the ability to use that information in the best way (for an essay, work assignment, protest rally, or whatever)
- Media literacy: the ability to read or view the various tricks used by the media to subtly emphasize one point of view, and the ability to compose messages that use media trickery effectively for a given rhetorical situation

In all three of those examples of literacies, I imagine the term developed as people began to realize how illiterate their friends and colleagues seemed to be. (Perhaps most terminology begins this way: as a way for individuals to draw attention to their own strengths in comparison to a rabbble of “those other people.” I definitely feel kind of cool when I catch a Twitter spammer.) In that framework, financial literacy works as a helpful term because so many people seem to lack basic skills related to budgeting, managing credit cards, and paying off debt. To people who have financial literacy, those who lack it seem to be missing a set of skills so fundamental that to not have them is akin to a reading person’s feelings toward someone who can’t read. Along the same tack, information literacy works as a term because so many people seem to lack the basic skills necessary to finding the information they need, especially in our increasingly information-centered world. And media literacy is a helpful term because so many people are duped by the political and social messages embedded in the news, movies, and music we consume.

So what happens when we apply these same ideas to new media reading and writing contexts?

New Media Literacies

New media is an awkward term; on its surface, it seems to imply media (news, music, TV, movies) that’s recent—it’s new. From that perspective, new media would be content that was distributed in the last few days or weeks, as opposed to all that hype about Justin Bieber, which was so last year.

But new media encompasses far more than that. In the introduction to an issue of the scholarly journal American Journal of Business, Jo Ann Atkin (2009) describes a complex mess of activities that could be termed “new media”:

> What do we exactly mean when we say “new media”? Most definitions of new media (and there are plenty) usually focus on three characteristics. That is, new media is a form of interactive communication that is both digital in format and distribution. This definition would encompass such technologies as: gaming, web sites, chat rooms, e-mail, virtual reality, streaming video or audio, blogs, real simple syndication (RSS), short message service (SMS), Twitter, wikis, online communities (e.g., Facebook, LinkedIn), and YouTube to name a few. The definition also implies that the computer or information technology plays a critical role in both message content/design and dissemination. (3)

Atkin’s list of new media technologies is a treasure trove for different angles through which we can understand new media literacy. As with other kinds of literacy, I’m reminded of all the people I know who aren’t literate in these areas (and I bet you know a few too).

For example, from the reading angle, I can think of plenty of people who

- are confused when faced with a video game, not knowing where to look for visual cues about what to do next
- don’t notice the visual cues on a computer desktop that instantly draw the attention of a more literate person
- miss the signs that an email or tweet is a phishing scam
- don’t realize that blogs are inherently spaces for dialogue in the comments section
- never stop to consider that web designers have purposefully chosen colors, layouts, fonts, images, and multimedia elements to make viewers think and feel in specific ways

And from the writing angle, there are plenty of folks who

- try to use Facebook in ways that feel weird to those who are literate in its use
- produce movies for YouTube that come across as boring, badly paced, ugly, or annoying
- write emails without knowing the expectations of their audience (who, for instance, might prefer to be addressed in complete sentences)
- think their Twitter followers really want to know every boring detail of their lives
- create graphics without carefully choosing effective fonts, colors, and layout options that will be most effective for their audience
- participate in wikis without respecting and following the formatting and structural decisions made by those who went before them

All of these people could be described as needing one or more of the skills wrapped up in the phrase new media literacy. These skills often have both a technical and a rhetorical angle. That is, those with exceptional new media literacy are masters at understanding and using technologies (e.g. getting around on social media sites, using photo editing software, producing videos), and they’re also masters at understanding the rhetorical needs of reading and composing in a specific time and space, for a specific audience who will judge a composition to be effective (e.g. designing a website that visitors think is attractive, saying something to Facebook friends that is likely to be “liked,” not looking like an ass when plodding around online in general).

So What?

If you’re asking, “So what?” the answer should be obvious: illiterate people need training and practice in literacy to become effective in contexts where those literacies matter. And just as traditional text literacy can be taught, so can these other literacies, both through immersion in contexts where those literacies are used effectively (like a U.S. citizen moving to Japan to learn...
the language, or a seventy-five-year-old woman who spends hours online every day to learn the conventions used by effective websites) and through instruction from experts.

The good news is that many traditional-age college students already have a solid grip on many new media skills—and they may not even realize how skillful they are! But there’s a subtle problem as well: like a child who goes around telling his family that he knows how to read when he really only knows his alphabet, it’s possible to overestimate the sophistication of one’s new media literacy skills. That is, I might say, “Um, I’ve been online every day since I was eight. Of course I know what makes an effective website or video or audio essay.” But when given a chance to show off some of my skills, I might suddenly be found lacking. All that skill I have at navigating new media spaces may not have translated into a complex understanding of the literacies at play there, keeping me from effectively being unable to describe what makes an effective new media text and even more unable to make one myself.

That’s why writing new media texts—or in this case, composing is probably the better term—is so important: it gives us practice in using our new media literacies in powerful ways while showing us the places where our skills are most lacking sophistication. It also reminds us of the importance of building our new media literacies within a community. When you compose a new media text—an email, video, digital song, audio essay, blog post, wiki page, or tweet—ask a few people what they think about it. Get their gut reactions, their subtle, first-impression-style judgments about if you’ve used your technology well and if you’ve effectively communicated to your audience in a way that works for them.

So go out and compose like crazy in any format you can find or invent—but all the while, ask yourself what you already know and what you still need to learn. And for goodness sakes, try not to look like a spammer while you’re out there.

References
Digital Ethics

by Dan Richards, Old Dominion University

<table>
<thead>
<tr>
<th>Learning Objectives</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Recognize ethical, legal and cultural issues in business and the professions</td>
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<tr>
<td>• Develop information literacy strategies</td>
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</table>

Netiquette, a hybrid word combining “network” and “etiquette,” essentially refers to the social code of the Internet. As such, netiquette -- how we communicate, treat others, portray ourselves, and protect ourselves online -- is a question of ethics. Ethics, or moral philosophy, refers generally to how groups and individuals determine moral courses of action. Because ethics refers to the way groups and individuals relate to, treat, and resolve issues with each other, digital ethics then encompasses how users and participants in online environments interact with each other and the technologies and platforms used to engage. How does an online discussion board community handle flaming? Is it right to give support to pirating sites? What images are appropriate for re-tweeting? Just how private should privacy policies be when agreeing to Terms of Services?

As with any ethical issue or moral dilemma, there is contention and a variegated palette of opinions based upon people’s politics, personalities, and purposes. From a rhetorical perspective, digital ethics is approached by asking a series of questions relating to textual and visual communication:

• What language and tone are appropriate for a given situation?
• What are the guidelines that govern a given online community?
• How are sources used, remixed, and/or altered for a given audience? How are these sources to be referenced or cited fairly?
• How do users portray themselves online, whether through social media, gaming, avatars, or other means? How is online ethos developed and maintained?
• How do users approach the increasingly blurred line between private and public?
• What constitutes (a) public?

There is no set way, no strict code of conduct for how to communicate or engage online any more than there is a strict code of conduct for how to hold a large, face-to-face conversation on campus (McKee 2002). There are, however, conventions to consider. It is useful to think of ethics as the “appropriate” methods for actions and relating to others in a given environment. Guidance or governance for effective online communication exists only through general patterns of experiences that accumulate over time. Beginning emails with a respectful salutation or filtering images you are tagged in on Facebook are not examples of following rules that are inherently true; rather, beginning emails with a respectful salutation or filtering images you are tagged in on Facebook are useful conventions of digital ethics to abide by because of the patterns of responses to rude emails or inappropriate online photo albums: a lack of response and a lack of a job, respectively. In light of the conventional and theoretical nature of netiquette, under the larger umbrella of digital ethics, one should not aim to memorize a list of netiquette ordinances (although these can prove beneficial in some circles), but aim to understand through
a rhetorical lens what digital ethics are and why they are important.

One of the most immediate reasons why digital ethics are important is because how we present, indeed construct our persona(s) affects the way in which our communication and intentions will be received. The notion that individual ethics impact our arguments is nothing new. Much of how we understand and categorize argumentation today stems from Aristotle’s “appeals,” which are generally understood as the means of persuasion -- how we support our arguments for specific audiences. In Aristotle’s Rhetoric, we see that there are three overarching appeals used to classify how we argue: logic (logos), emotion (pathos), and the character of the speaker (ethos). (For further information about these rhetorical appeals, see “Rhetorical Appeals.”) These appeals are not represented hierarchically, not in any order of importance; no, Aristotle penned that the most articulate, effective communicators successfully weaved elements of all three appeals into their speech. Skilled orators were to provide logical proofs of their claims, embedding them in a larger concern to judge and alter the emotional disposition of the audience, all the while portraying themselves as credible, reliable authorities with only good will for the public. This rhetorical balancing act places as much importance on the logic and coherence of an argument as on the speaker uttering the argument. To appear credible, one must “display (i) practical intelligence (phronēsis), (ii) a virtuous character, and (iii) good will” (Rhetoric II.1; 1378a6ff). Ultimately, the validity of proof, of scientific and political claims, rests upon the character of the individual.

Of course, there needs to be some reinterpreting of the Aristotelian appeals for the modern communicator. No longer do we as humans construct arguments and share them sporadically in public symposia. Our understanding of rhetoric asserts that most of what we do and say are argumentative in some form, and the ubiquity of technology today means that what we do and say are more “public” than ever before. Communicators in the twenty-first century must constantly think about how to represent themselves in physical and online communities. Facebook profile pages, for example, represent a form of “building character,” not in the sense that people become emotionally stronger through overcoming adversity, but in the sense that profile pages on social media sites literally figure as constructions of the self, as digital representations of character – of Aristotelian ethos.

Who am I?
Click on the About link.

What social and political organizations to I ascribe to?
Check my Groups and Likes.

What activities do I engage in?
Browse my photo albums.

With whom do I associate?
Scroll my friends list.

What are my beliefs?
Read my status updates.

Exercises

1. Imagine that you are applying for your dream job. Now, putting yourself in the position of your potential employer, run an internet search for your name. (Make sure that you are signed out of all of your internet-based accounts. Also, if you have a common name, you might need to add some additional information, such as a full middle name, zip code, or birthdate.) What information can you find out about yourself? What impression might a potential employer have of you based on this information? Is this an accurate representation of your character? Why or why not?

2. Choose two online communities: one that you are either well-versed in using and one that you are unfamiliar with. For each of these communities, answer the 6 questions that appear at the beginning of this article. Were these questions easy or difficult to answer? Why? If you didn’t already know the answers, how did you go about finding the answers?

References


Digital Footprints: Public Writing and Social Identities

By Cassandra Branham and Danielle Farrar, University of South Florida

Learning Objective

- Compose professional/workplace documents and oral presentations for multiple audiences and specific purposes, using appropriate technologies.
- Apply/adapt professional writing conventions, including genre, tone, and style for particular writing situations.

Mark Zuckerberg claimed in a 2010 interview that we all have only "one identity" (as cited in Mainwaring, 2010). But as we have witnessed social networking sites (SNSs) set up shop across vastly different communities for vastly different purposes, it has become clear that Zuckerberg cannot be right. While there may be similarities found in an individual’s Facebook, LinkedIn, and Ravelry profiles, the differing target audiences, interfaces, and SNS purposes make it easy for an individual to create and express a plurality of social identities.

Although the concept of social identity is not new, social networking and new media technologies have extended our understanding of social identities. Furthermore, writing plays a significant role in the various online spaces we use to create our individualized digital footprints—that is, the digital trail of data that we leave behind when interacting in or with online technologies. Whether we write on Facebook to share with friends or families or on LinkedIn to connect with other professionals, the act of public writing should be executed with thought and critical consideration.

With employers regularly looking to SNSs to tell them whether or not to hire prospective employees, it is crucial for individuals to be aware of not only what their social identities reveal about themselves but also how this information can be interpreted. A 2011 survey of hiring professionals reveals that 91% of employers do active screening of potential employees through social networking sites; 76% of the time they screen through Facebook, 48% through LinkedIn, and 53% through Twitter (Swallow, 2011). Additionally, "In June 2013, a nationwide survey by CareerBuilder found that more than two in five hiring managers (43 percent) who vetted applicants online did not hire an applicant based on information found online" (Jodka, 2013).

For instance, a study on online relationships between employers and employees points out that "companies that screen applicants via social media may misunderstand online behavior, causing them to eliminate good candidates" (Olier-Malaterre, Rothbard, & Berg, 2013, p. 648; Jodka, 2013). Hiring managers may misinterpret information found online because this information is often decontextualized. It is already clear that maintaining privacy in online spaces is highly difficult, if at all possible, to manage effectively. Thus, when hiring managers or other people in positions of power access digitally-archived information (as in a Facebook timeline or Twitter feed), this information is not contextualized for the viewer/reader, so they interpret that information in accordance with their own experiences. Because this information is not "tailored to the particular relationship or situation, […] its original context and meaning may be skewed" (Olier-Malaterre, Rothbard, & Berg, 2013, p. 648).

Despite the fact that public writing has become popular in the creation and performance of social identities, some people think little about what they write online. It is clear that poor choices in public writing influence employers in their hiring decisions. As this infographic (http://mashable.com/2011/10/23/how-recruiters-use-social-networks-to-screen-candidates-infographic/) shows, decisions to not hire have been made because prospective employees "posted inappropriate comments, “demonstrated poor communication skills,” or “made discriminatory comments,” among doing other things (Swallow, 2011).

Employers scrutinize social identities for information related to their applicants. But employers are not the only ones using SNSs as vetting tools. Bill Greenwood draws attention to the fact that "21% [of the 243] college and universities surveyed stated that they research and recruit potential students on social networking sites" (2009, p. 1). Thus, when thinking about what digital footprints you want to leave behind, your choices when writing publicly should be carefully designed and executed.

Some public writing spaces on which students are active include the following:

- Learning Management Systems (LMSs), such as Blackboard and Canvas
- Facebook
- Twitter
- LinkedIn
- Academia.edu
- Blogging sites (e.g., WordPress, Blogger, or Tumblr)
- Discussion forums or wikis

The approach to public writing and the creation of social identities is no different than traditional approaches to writing: the writer should be aware of his or her audience, the publication venue (e.g., a newspaper, online blog, or academic journal), and purpose (i.e., why am I writing this?). When an individual creates a digital footprint (or regularly updates it), he or she needs to be fully aware of these same things. However, regardless of these differences in SNSs, information posted is generally made available to the public, and “private” information can be accessed if an employer wants it.

With the rapidly growing number of SNSs, Internet privacy has become a contested area, and more and more SNSs are offering levels of privacy. Private or password-protected blogs have become more common, and some sites like Google+ and Facebook have made it possible for you to tailor and share information with specific groups of people. Furthermore, LMS blogs like those on Blackboard and Canvas are heavily secured sites, and what you write publicly in these spaces will only be visible to your instructor and classmates. In this way, Blackboard and Canvas writing is semi-public. The advantage to using the Blackboard and Canvas blog (http://
writingcommons.org/open-text/new-media/blogging) function is that while they work like other blog spaces, they provide more privacy.

Similarly, professional SNSs like LinkedIn and Academia.edu have gained popularity. The goal of these sites is to professionally network and share ideas, documents, or articles specific to professional identities. LinkedIn’s interface resembles a digitized version of a résumé or CV where users can list their educational and professional experience in addition to professionally relevant skills. Academia.edu is the academic version of LinkedIn and allows people working in academia to list their research interests and upload publications and current works-in-progress, as well as network similarly to how people network on LinkedIn.

Public Writing Etiquette

Many of us have sent a text message, email, or Facebook message that unintentionally offended someone because digital writing disallows the reader access to social cues, such as body language, facial expressions, and vocal tone. Before undertaking any type of digital writing, a writer should be aware of the way readers may perceive his or her words by taking precautions to avoid sounding offensive. These precautions are especially important when considering digital footprints and social identities because of the longevity of information posted on the Internet: some online writing spaces continue to exist years after the original posting date. When writing publicly, always ask yourself if your words reflect the person you want to be in ten, or even twenty, years. Even if you write something that you later delete, you should be aware that your posts can often be retrieved by archiving sites such as www.archive.org. Be aware of Internet etiquette and norms—especially those particular to individual online writing spaces. Writing with those norms in mind will help you avoid publishing something online that you may regret and prevent you from creating a troublesome digital footprint. Some general norms regarding Internet etiquette include:

1. **Respect the community.** Interact with members of the online community in question in a way that reflects the treatment you would expect to receive. In other words, be nice.
2. **Listen to others.** When someone presents an opinion that is different from your own, make an effort to understand that person’s perspective on the topic. Resist the urge to immediately tell someone she is wrong simply because her opinion differs from yours. Remember that many employers made the decision not to hire because a prospective employee may have made personal comments that the employer interpreted as objectionable.
3. **Be accountable for your actions.** The perceived anonymity of online interactions causes some users to feel comfortable writing things they would not say in a face-to-face situation. Take responsibility for your actions and never write something online that you would not feel comfortable saying in person (Brantner, 2011). The Internet Protection Act, which requires web administrators to eliminate anonymous postings, is aimed at increasing accountability in online interactions.

Therefore, while there are many benefits to public writing, students must do so responsibly. Consider, for example, whether or not a specific form of electronic discourse (txt spk, colloquial language, Internet jargon, etc.) is a viable and effective form of writing for a particular online forum. Remember that different target audiences prefer different forms of written expression, which is the benefit to having several social identities. Also, be sure not to include any material that would be considered unacceptable in the space in which you are composing. This does not mean that you cannot express your opinions within your own writing or in response to others, but you should express your opinions in a caring way that shows respect for those opinions that differ from your own.

Public Writing in Practice

Now that you have read about digital footprints and the potential negative implications of public writing in digital spaces, let’s practice applying what you’ve learned by using two scenarios that you may have already encountered on Facebook and Twitter.

**Scenario 1:** Imagine that you are perusing your Facebook page around the time of an upcoming presidential election. You see that someone in your network has posted a comment in support of her favorite candidate, but you notice that the content of her post is biased and, in your opinion, misinformed. You are upset by the content of this post, and you aren’t sure how to proceed. Which of the following actions do you perform, and why? Think about the potential implications of each action.

- a. Unfriend this person.
- b. Hide this person from your newsfeed.
- c. Ignore this post and move on with your day.
- d. Comment on this person’s post.
- e. Send this person a private message.
- f. Other.

**Scenario 2:** Imagine that you are on Twitter, reading through tweets that contain hashtags associated with trending topics. One of the trending topics deals with a recent news story that has gained international attention and you come across a tweet that uses racial epithets to describe the persons involved in the case. While you agree with the content of the tweet, you don’t agree with the language used to describe those involved in the case. Which of the following actions do you perform, and why? Think about the potential implications of each action.

- a. Favorite it.
- b. Retweet it.
- c. Do nothing.
- d. Comment on this person’s post.
- e. Write your own tweet.
- f. Other.

Conclusion

When publishing online, be sure that you are respecting yourself, the members of your online community, others who may read your posts, and the writing space itself. Even though you create your own digital footprints and social identities, “Social media profiles […] are not a reflection of one’s identity, as Facebook’s Mark Zuckerberg wants us to believe, but are part and parcel of a power struggle between users, employers/employees and platform owners to steer online information and behavior” (van Dijck 212). Remember that identities are created both inwardly and outwardly: while you maintain your own understanding of who you are, as identi-
ty research explains, your identities are also created by how others perceive and interpret you. In short, you should always strive to represent yourself professionally when writing publicly in order to critically control your digital footprints.

**Exercises**

1. Visit your Facebook profile page and locate a post, composed or shared by you, that you think might be potentially upsetting to either existing members of your social network or to secondary connections who might see your post. Write a short paragraph describing your initial intentions when composing or sharing the post. Additionally, reflect on how members of your audience might have interpreted your post in a way that you did not intend.

2. Visit Twitter and examine the current trending topics. Within one of the trending topics, locate a tweet that you find offensive or that you think could be offensive to certain audiences. Write a short paragraph describing your interpretation of the initial intentions of the tweeter. Additionally, revise the tweet to be more appropriate for Twitter's audience, and justify your choices.

**References**


E-mail Guidelines for Students

By Lee Ann Hodges, Tri-County Community College

Learning Objectives

- Compose professional/workplace documents and oral presentations for multiple audiences and specific purposes using appropriate technologies
- Apply/adapt professional writing conventions, including genre, tone, and style for particular writing situations

College students are often required to use e-mail to communicate with instructors, staff, advisors, and peers. As their studies advance, students may also use e-mail to contact professionals in their field for service-learning or job opportunities. College is the beginning of students’ professional lives, and e-mail messages can reflect positively or negatively on their professional image.

E-mail Accounts

Most colleges provide students with a college e-mail account—use it! Here’s why:

- Using a college-provided e-mail address identifies you to the sender so that your e-mail is less likely to be deleted out of hand or quarantined by a spam filter.
- You can keep college and personal e-mail separate, which will help you stay organized.
- You don’t have to be as concerned with the impression that a cutesy or risqué personal e-mail address may create. (Think “hotmess@gmail.com” or “drinkingbuddy@yahoo.com”)

If your college does not provide students with an e-mail account, set up an account yourself for use only for coursework and professional contacts. Use your real name rather than a pseudonym so that recipients can readily identify you.

The Subject Line

Think of a subject line as the title for the e-mail; it lets the reader know what to expect from the message. The subject line is crucial, yet many students skip it. Invest an extra minute in a specific subject line, and it may make the difference between being ignored and answered quickly.

Most professionals receive numerous e-mail messages each day, yet they may have little time to respond. Many people prioritize answering e-mails on the basis of the subject line. A blank subject line is not useful to the reader; furthermore, if the e-mail address is unfamiliar, the message may get mistaken for a virus or SPAM message and deleted.

Make subject lines as specific as possible. General subject lines such as “Question” or “Hello” aren’t helpful in conveying the content of your message to the reader. Here are a few examples of ineffective and effective subject lines:
<table>
<thead>
<tr>
<th>Ineffective Subject Lines</th>
<th>Effective Subject Lines</th>
</tr>
</thead>
<tbody>
<tr>
<td>Question</td>
<td>Question About POL 120 Research Paper</td>
</tr>
<tr>
<td>Request</td>
<td>Recommendation Letter Request</td>
</tr>
<tr>
<td>Project</td>
<td>BIO 275 Group Project Submission</td>
</tr>
<tr>
<td>Meet</td>
<td>Study Group Meeting Times</td>
</tr>
<tr>
<td>Job</td>
<td>Assistant Network Administrator Inquiry</td>
</tr>
<tr>
<td>Plan</td>
<td>Marketing Plan Recommendations</td>
</tr>
</tbody>
</table>

Notice that the effective subject lines above use title case, in which the principal words are capitalized. However, sentence case can be effective for subject lines expressed as complete sentences. Examples: "Are you available Wednesday?" or "Thank you for your time."

Salutation

The salutation is the greeting, such as "Dear Dr. Marks" or "Good afternoon, Ms. Cho." Salutations can range from informal (Hi, Dr. Stein!) to formal (Dear Professor Williams); when choosing a salutation, students should consider their audience, how well they know their readers, and the writing situation.

- Double-check the spelling of the recipient’s name and his or her honorific (Dr., Mr., Ms., etc.). If the marital status or preference of a female recipient is not known, use “Ms.” rather than “Miss” or “Mrs.”
- Do not guess if you are uncertain of a person's honorific or gender; incorrect assumptions of gender or educational level can be awkward for (or even offensive to) the recipient. Using a position title is an excellent solution. Examples:
  - Dear Director Kelly:
  - Dear Professor Glover:
- Do not use first name only with an individual in a position of authority unless invited to do so or if the recipient has signed a previous email to you with only his or her first name.
- It’s OK to omit a salutation in some cases:
  - When there’s a good chance of getting the honorific incorrect, such as in the case of a recipient whom you’ve never met with a gender-neutral name.
  - When you aren’t sure who will read the email; sometimes email addresses are set up for an entire department or for general information requests.
  - When the email is sent to a group. (However, it’s also fine to add an inclusive salutation, such as, “Dear colleagues” or “Hello, all.”)
- When the email is very brief and straightforward, such as in the case of a reply to a previous message.

The Message

All but the briefest and most straightforward of messages should use the three-part structure of introduction, body, and conclusion. Emails are usually short, so keep each of these three parts brief; it is common, for example, to have one-sentence introductions and conclusions.

- Introduction: State the purpose of the message.
- Body: Supply the necessary details.

- Conclusion: Close with a courteous statement or action information, such as deadlines and contact information.

Sample E-mail Message

SUBJECT: Internship Recommendation Request

Dear Dr. Boyer,

I was in your ENG 309 Technical Editing class last fall and learned many techniques that could be used in an internship for which I’ve applied. Would you be willing to recommend me for the position?

The internship is at Spectrum Publishing, which produces print and web-based textbooks for high school science courses. As you may recall, although my major is in English, I chose a minor in biology in hopes of obtaining a job in a science-related publishing field.

The recommendation is a simple web-based form that can be completed at http://spectrumpublishing.com/internrecommendation. The deadline is April 15.

I hope you’ll be willing to recommend me. The internship is a perfect fit for my interests and goals, and a note of confidence from a professor with in-depth experience in this field would carry much weight. I look forward to hearing from you!

Thank you,

Cynthia Voight

Receiving to Messages

When replying to an email message, you have a few options:

- Replying to all recipients or just to the sender
- Replying with or without the original message

"Reply to all" should only be used when everyone who received the message needs to see your reply; this feature will send your response to everyone listed in the "TO" and "CC" lines. Carefully consider whether the entire group needs your response before using "reply to all"; unnecessary use of this feature is annoying to your readers.

The "reply with message" feature is useful for supplying automatic context for a response. One caution, however: make certain that you type the response at the top of the message, not at the end, where your reader must scroll down to locate it.

Do not use the reply feature to start a new conversation on a different topic; create a new email message with a fresh subject line.
E-mail Content, Organization, and Formatting Tips

• Provide all details the reader may need.
• Supply proper identification if the recipient does not know you or may not remember you. For example, list your course and section when corresponding with a professor. Unless an instructor has an unusually small number of students or an exceptionally good memory, he or she is not likely to remember which class you’re in, especially early in the semester. If inquiring about a service-learning opportunity, mention your college and how you learned of the position.
• Avoid stream-of-consciousness messages. In other words, don’t just write words as they come to you; read it from the recipient’s perspective and edit accordingly before you click “send.”
• Watch your tone and be respectful, especially if you’re frustrated when you send the e-mail.
  ° Poor Tone: “I tried to access the link to the Opposing Viewpoints database you recommended, but it won’t go through! How am I supposed to complete this assignment?!"
  ° Diplomatic Tone: “I tried to access the link to the Opposing Viewpoints database, but I got a message that the server was unavailable. Is there a different database with similar information that I could use?”
  ° Unprofessional Tone: “Sorry for submitting the components of internship application separately. The requirements were really hard to find on your website, and I just now realized that I hadn’t submitted one of them.”
  ° Professional Tone: “Attached is the personal statement required for the internship application. I sent the personal information form and recommendations on May 4, so this submission should complete my file.”
• Use proper paragraphing. Many writers make the mistake of lumping all the content of an e-mail message into one long paragraph. Short paragraphs lend themselves well to skimming, a practice that most e-mail readers use.
• Add a space between paragraphs to provide a visual clue as to where a new paragraph starts.
• Use standard English. Text language is unacceptable.
• Run a spell-check. In fact, consider writing important or lengthy messages in a word processing program, which generally has better spelling and grammar checkers than e-mail programs. When you’re satisfied with the draft, you can copy and paste it to the e-mail program.
• Make sure that any attachments you intend to send are truly attached. Also, refer to the attachment in the message itself to alert the reader to its presence.

E-mail is an excellent academic and professional tool that students can use to their benefit. Extra time spent crafting effective e-mail messages is an investment in a practical and valuable communication skill.
Chapter 5: Ethical Communication

Why Ethics Matters in Technical Communication .................. 136
Establishing Credibility in Technical Communication ..................... 139
Ethics in Written Communication ........................................ 142
Practicing Intercultural Communication .................................. 146
By Megan Mandell, University of South Florida

As technical communicators, we have a responsibility to observe ethical principles in the workplace and in the texts we produce. Ethics, or concepts of right and wrong, influence decision-making, collaboration, research practices, data collection and interpretation, data visualization, and user content, among other workplace scenarios. The approaches to handling these situations, though different, are intertwined. Company executives, for example, need to be sensitive to legal approaches to ethics so they ensure they are following the law, while their employees (who may be producing technical documents) may utilize a user-centered approach since they are concerned with a diverse audience. Both of these methods are ultimately beneficial. It may not be immediately obvious, but our colleagues and our audiences depend on our considerations of ethical practices in producing written and visual texts. Why? The following article will help explain some of the nuances of ethical deliberations.

Professional Guidelines

The Society for Technical Communication outlines six categories of ethical principles that technical communicators should consider: Legality, honesty, confidentiality, quality, fairness, and professionalism. It is important, then, to understand that, as a technical communicator, you are expected by the profession to behave in a way that reflects an understanding of your responsibility to act ethically while maintaining a commitment to your field. This means you are responsible not only for following the legal guidelines that affect things like contracts, plagiarism, client protection, and author attribution in research materials, but also a moral code of conduct that purposely strives to work for the public good by producing accurate, accessible, and unbiased documents. It is exceedingly important, for example, in an age of digital information, that you consider the implications of writing to a diverse audience and examining cultural biases, maintaining strict conduct regarding crediting others’ work, and creating responsible and honest portrayals of yourself and your company online and in print. Serious consequences can result from failing to follow these best practices, including forfeiture of professional licenses, retraction of your work, or even loss of your job.

In addition, you may also sign a contract upon obtaining a new position or client, or when publishing your own work. It is imperative that you honor such obligations in order to maintain professional standing and/or avoid being held liable for mishandling or misrepresenting information. Part of your ethos as a technical writer, or the reason people trust your written communication, is that you are trustworthy and dependable in the day to day responsibilities and actions in your job performance.

Why Ethics Matters in Technical Communication: A Brief Introduction

Applying Workplace Ethics

In your profession, you will likely be considered a specialist of some sort. Perhaps you are writing technical manuals that many people will utilize to operate a new technology, or maybe you are an architect producing blueprint designs for an upcoming building project, or possibly you are writing a medical blog describing innovative research being done by Doctors Without Borders. In any event, it is your responsibility to produce documents that are accessible to your audience. Your writing should always be user-focused, but at the same time you should consider the ways in which your language represents the company for whom you work. At times, these ideas may seem at odds, and it is important for you to distinguish the practical or expedient approach to fulfilling your job requirements and your ethical responsibility to the public. Thus, you need to be aware of some crucial elements of applying ethics in the workplace.

Consider this: you and a colleague are working towards designing a new website that informs users how to find and access the many wildlife refuges and state parks Florida has to offer. The project is on a strict timeline, and your colleague suggests simply copying information from a similar site developed by a different organization a few years ago and using it as a template by tweaking the information a bit. If you do not meet the timeline, your company’s hours will be over budget, and your boss and colleague may not be pleased with you.

There are several ethical problems at play here. For one, using sources from another site without crediting them is dishonest and usually illegal according to copyright law. Not to mention, you would be stealing work from other technical writers in your profession. Using outdated information to save time is a poor research practice and also contributes to bad usability; your audience will not benefit from your product. Further, there will likely be a lot of embarrassment and potential discrediting of you and your other work when people in your field discover your duplicity. There is also the consideration that your team has not used its time or resources properly, contributing to an unprofessional workplace environment. This is why planning how to approach a project ethically from the very beginning is a crucial strategy to developing and sustaining professional and ethical standards. Your character is at stake, as is the character of your company.

User-Centered Ethics

While accuracy and honesty are important places to begin considering ethics in technical communication, user-centered ethics also need to be a priority. It is often said that writing does not exist in a bubble. As a writer/producer of any sort of document, including visual representations, websites, technical manuals, grants, reports, and even e-mails, flyers, and pamphlets, your writing is entering into a community discussion. Anything you produce will be part of a larger conversation about your topic, and thus you should approach your audience with an awareness for their values and needs. The first step to getting this right is identifying your audience. Who will likely be using your product? What levels of experience do they have with the product information? Are you assuming users are all able-bodied, or have you made considerations for people with disabilities? In your writing, are you using loaded words and phrases that are potentially harmful or alienating to your audience? Have you considered how non-native English speakers or non-Western audiences might access your product?

It is also important to provide your qualifications for expertise. Have you researched your infor-
information thoroughly and provided transparent evidence that documents your practices? Have you followed legal and professional guidelines for conducting this research? Research can fall anywhere between asking a colleague’s advice to executing a Google search to conducting large-scale surveys or interviews, and there are various ways to accomplish and cite your research. Claiming ignorance of workplace research practices will not bar you from the consequences of unethical communication.

You must also consider how you format and present your document. Has any personal bias potentially skewed your findings or results? Have you created visualizations that fairly and accurately represent the data you have collected? For instance, if you are writing about human lives lost in a tragedy, are you visually representing the humanity of the event, or do you treat those lives as numbers, unethically masking the human factor of the event in your retelling of it? Have you given credit to the colleagues or other sources who have helped compile data or influenced the ideas in your document? Have you provided a format that people of varying backgrounds and abilities within your audience can access in spite of economic or other limitations?

The end product that users will see must account for these instances and more in order to be considered ethically sound. Users should be able to trust the integrity of the document as they utilize it for their purposes. If any of the information is inaccurate, dishonest, or lacks credibility, you may be affecting a user’s ability to operate ethically without even realizing it. It is unfair to make a user responsible for your misconduct. For instance, if you design a new database for storing protected patient information at a medical office and you take shortcuts or use bad research practices that result in a design flaw, patients’ rights could stand to be violated under HIPPA law. The medical office could be sued for malpractice, which in turn might result in several people losing their jobs. This is just one small example of the various ways your ethical positioning could affect many lives, not just your own, and in very intense ways.

Summary

In short, you have a professional and moral obligation to perform ethically as a technical communicator. The ethical implications of your workplace persona and development of products is taken very seriously, and you should carefully consider how you proceed in project development, research practices, and end user content. Ignoring the ethical situation can result in costly and crippling long-term consequences that will affect you, your company, and your clients.

Exercises

1. Consider the above scenario in which you and a partner are creating a website. How could you have approached the issues differently from the beginning of the project in order to account for ethical considerations?

2. What might be some potential ethical dilemmas in your chosen profession? Why would it be best to approach them legally? Why is it important to consider a user-centered approach to solve them?

3. What are some resources you can use to determine how to make ethical decisions in the workplace?
Establishing Credibility in Technical Communication

By Megan Mandell, University of South Florida

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<td>• Recognize ethical, legal and cultural issues in business and the professions</td>
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<td>• Compose professional/workplace documents and oral presentations for multiple audiences and specific purposes using appropriate technologies</td>
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In technical communication, whether from the perspective of a professional writer, an engineer, or someone in the medical field, it is crucial to understand the importance of establishing credibility as an author. Often, you will be producing documents, graphs, charts, and other visual aids in order to inform and persuade your audience in some way. In classical rhetoric, Greek philosopher and rhetorician Aristotle describes ethos, one of the rhetorical appeals, as a mode of persuasion that appeals to the speaker’s authority or credibility. In other words, employing ethos in your argument demonstrates that you are qualified to present information about the topic. Speakers or writers can establish this credibility in several ways, each of which will highlight one or more of the main components of ethos. Aristotle refers to these categories as “good sense, good will, and good character.”

I. Exhibiting good sense means positioning your writing in a way that is sensible to the audience. Technical writers want to ensure a product’s reliability and accuracy while also connecting with the audience. Understanding the needs of the audience is important in user-centered communication. Using words, phrases, instructions, or examples that an audience is unfamiliar with, or may find confusing or daunting, might make users uncomfortable and unable to understand or use the product with ease. Here, one might also consider ways in which unintended audiences might interpret the technical communication as well.

Some concepts to consider when creating sensible material are:

• Audience Analysis
• Vocabulary Usage
• Format and Design Principles
• Transparent and Organized Data
• User-Centered Examples
• Intercultural Communication
• Establishing a Relationship with the Client

II. Showing good will in technical communication can be related to one of the tenets of the field, which is to operate for the good of the public. Technical writing should be produced with the intention of providing a public service. Documents should be ethically constructed and uphold professional and legal standards that exhibit consideration for researchers, representatives of the company, and users of the product. Technical communicators should produce
honest and accurate material. Technical documents should be reviewed for clarity and should demonstrate an ability to reach the audience without leaving out important information or making the information difficult to access. Documents that are not clear and concise often lead to problems of ambiguity, which may hinder a product's usability, or create unintended uses or skewed perceptions of the material. In striving to achieve good will, technical communicators should evaluate the purpose, design, and usage of their products for fairness and quality.

III. Good character is an important persuasive device. One commonly used phrase, “lead by example,” illustrates the contemporary appeal to giving credibility to people who exhibit “good” behavior. Authenticity is key. Creating trust is a fundamental element in establishing ethos, but this trust must be based in fact, not manipulation of the audience. Too often product placement, commercials, and blogs mishandle this component of ethos by creating a false trust in order to lure a customer in. Technical writers must adhere to a stricter code of conduct by exhibiting superior research practices and ethical conduct in their workplace practices. At times, this will extend into personal behaviors. For example, giving a positive product review for a close friend on his or her company’s website, using company technology or time to produce personal materials or materials for another client, or disclosing client information in casual conversation with friends opposes good character traits.

Exercises

1. Imagine you are an entry-level employee in your field. Consider the various documents you may be responsible for creating. How would you use good sense to establish ethos in one of these documents?

2. Think of some examples of popular commercials or Internet ads you have encountered. How do they misuse good character in establishing ethos for their client base? Suggest ways of fixing their misleading information to make it more ethical.

3. When establishing good will, what are some important considerations you might make in producing data visualizations that provide young college students with information on voting? Provide some examples of voting campaigns that might seem at odds with public service and explain why.

Ethos can further be understood in terms of creating an identity or image. When performing technical writing for a company, usually one is not viewed as an individual, but as a member of the collective company. The documents produced will help establish the company’s image. Imagine, for example, that Elizabeth and James are working for a construction company and are responsible for creating external documents about an upcoming job site. The company will be creating residential buildings located near a nature preserve in south Florida, where panthers are noted as endangered animals. The company would like Elizabeth and James to produce a short report that will discuss ways in which the company will promote and enact strategic measures to ensure the safety of the surrounding wildlife. This report (see White Papers) will be given at a Town Hall meeting, where local residents may express concerns about animal welfare. In this example, it is the technical writer’s responsibility to produce a document that speaks to the company’s ethos as a responsible advocate for protecting wildlife in the geographic areas in which the company operates. They will need to consider concepts such as audience awareness, statistics, and the company’s track record involving animal welfare at other job sites. Doing so will perpetuate an ethos of civic responsibility, an important goal of many companies, and often a major purpose that drives the production of external documents, including advertisements and online presences such as social media outlets and websites. Internal documents, as well, play an important role in establishing ethos. As an employee, a technical writer’s language in e-mails, memos, contracts, reports, and other documents will represent their image within the workplace.
Ethics in Written Communication

By Johanna Phelps-Hillen, University of South Florida

Learning Objective

• Recognize ethical, legal and cultural issues in business and the professions

By now you are familiar with ethos, pathos, logos, and kairos, which are all traditionally associated with effective communication. This article adds a layer of complexity to these rhetorical tools by discussing ethics in written communication.

Our word “ethics” stems from the Greek term ethikos. The Greek word ethos serves as the root for ethikos. Telling you the roots of all these words is important; I promise.

\[ \text{ethos} \Rightarrow \text{ethikos} \Rightarrow \text{ethics} \]

It’s important to note ethos, a rhetorical appeal Aristotle offered as a definitive component of persuasive communication, serves as the root for the English word “ethics.” I focus on ethics here instead of morals. The way you write is undergirded by a—perhaps unwritten/unspoken/not thought— theoretical understanding about how you should use, interact with, and deliver written communication. These principles are external and associated with the society you inhabit. Your morality, on the other hand, has to do with your day-to-day decisions based upon this theoretical underpinning; it’s the way you embody those external beliefs about what is good and right and marry them to your own evolving (or stable) understanding of how to be a good human being. As you read this article, then, consider how external societal pressures (like our political system, our history, globalization, modes of written communication), as well as those pressures from your workplace, education, and personal relationships, impact your ethical approach to written communication.

This chapter is based on the following premises: that all human life is valuable, that written communication inhabits my and your particular sphere of human interaction and is a necessary component of for its successful function, and that regardless of one’s work, an understanding of ethical approaches to written communication is necessary to do what is in the best interest of the greater human community.

Let’s consider the following scenario:

In your technical communication professor’s latest email, (sent on a Friday at 4:30PM) you are reminded to read this chapter and a couple others for your next class meeting on Monday morning.

You arrive in class Monday morning, and she announces “Pop quiz on the readings! Pull out your notebooks and tell me about ethics in written communication!” with a sly grin on her face. The class lets out a collective groan. Depending on what your weekend looked like, your beliefs about the purpose of things like course readings, education, and email communications, and whether you remembered to bring paper to a technical communications course, you may also groan.

Why did everyone groan? I’d wager one of the main reasons is that if the instructor had mentioned in the email that you would have a quiz on the readings, then you would have been more likely to read carefully so you could succeed on the quiz.

But, she didn’t mention a quiz at all.

Thomas Huckin called these sorts of omissions textual silences. He defines them more specifically as “the omission of some piece of information that is pertinent to the topic at hand” (Huckin, 2002). Your instructor may think that a pop quiz is the most effective way to keep you on your toes; for her, your ethical obligation in the class is to be sure you complete the required readings and assignments. But for some students, this textual silence could represent a miscarriage of ethics in written communication. You expect a degree of guidance from your instructor about what to pay attention to (you’ve got a lot on your plate and aren’t always able to read everything) and if you had known there would be a quiz, you certainly would have read.

For a workplace example, let’s consider the case of the Deep Water Horizon explosion and oil spill. 11 workers were killed, 16 injured, and countless natural resources were destroyed in this event. The entirety of the fallout of this spill is not yet known. Based on their report to an extension of the US Department of the Interior, the Minerals Management Service, BP was not required to provide a comprehensive plan in case of a rig explosion, spill, or leak. Their technical documents submitted to the US Government indicated that such an event was unlikely, and since the operation was so far offshore, the impact would be negligible. On top of this, despite voicing concerns about the safety of the rig, workers on the rig felt pressure to report false information to maintain their jobs. The intersection of power, money, resources, and human life proved costly, and internal documents convey the importance of honest, deliberate action and writing.

When there are so many stakeholders involved, it’s easy to realize the variety of ethical standpoints individuals in different positions can take. But setting aside the rich philosophical debates regarding the wide range of ethical standpoints and questions, as well as the variety of ways in which we study ethics, here’s why having a perspective of honest, ethical written communication is important: it makes you a better technical and/or professional communicator.

So, if you’re not doing it for moral reasons, you can do it for one of these two other reasons: (1) because you wouldn’t want to be on the receiving end of the textual silence, lie, or omission and/or (2) do it to be better at the work you’ve been tasked with.

It is widely accepted that establishing ethos is a key component of being an effective communicator. Aristotle tells us that conveying ethos in communication relies heavily on three things.
In summary, someone looking to convey ethos will want to show that they have: (a) the skills and wisdom (phronesis) to talk about the thing, (b) that they are a good (or, as it's more traditionally translated: virtuous) person (arête), and (c) that they have "goodwill" or eunoia for their audience. I'll stick my neck out here and correlate effective ethos in written communication with a genuine personal ethics that is conveyed while working to establish Aristotle’s A-C.

While we've expanded our ideas of what ethos is since Aristotle's time, these particular characteristics are useful for our discussion. They illustrate that correlating ethos with engaging in ethical written communication practices can be a dangerous idea. Some writers are excellent communicators and skilled at establishing ethos, even though they are entirely unethical. How can this be? Take this example:

I believe I am well qualified to write this chapter of a textbook for technical communication students because while I am getting a PhD in Rhetoric and Composition, I have a background in ethics from the disciplinary standpoint of philosophy. I have taught the course you are in. I have experience showing students in your position those gaps, those textual silences, which can (and sometimes do) lead to serious problems involving human life. I am writing this chapter for you so that you can have an introduction to the notion of ethics in written communication.

Now, chew on this: Are all of these things verifiable? Which, if verifiable, are true? Do you have time to verify any of this? If we move into the realm of something more important to human life—like drug trials, public policy, medical interventions, debates about food safety, car recalls, education, vaccination, police force—imagine how much more important the answers to those questions would be. These examples, these professional spaces, are exactly the environments wherein technical and professional communicators work. Recognizing the importance of transparency and clarity is therefore hugely important.

I've discussed textual silences, which can be either innocuous or obvious. But other sorts of violence can be done by unethical written communication: authors can lie outright or misrepresent complex facts or data. Writers can even suggest or claim that they've done work that's not their own (plagiarism).

When writers provide false information to their audience, or omit necessary information, their writing is neither ethical nor professional. We are part of a wider human community that relies on writers’ expertise to convey information. This, despite everyone’s wishes, cannot be done without a specific lens—the lens through which you—the author—sees the world. BUT, our human community relies on technical and professional writers to effectively and honestly convey information. If we don’t do our due diligence, if we exclude information that we are accountable for, if we lie in our written communication, we have not only failed to do our job, but we’ve failed our greater human community. Each individual in this community, the individual reading your writing, is not always able to verify the information in the written communication you produce. They rely on you. To establish true ethos, to be effective communicators, we cannot simply convey a clear sense of wisdom, honesty, and care; we must also write those things.

Exercises
1. Think of, and then freewrite about, a recent time you were frustrated or angry after reading an email, text, or new/online article. Could those frustrations have stemmed from a textual silence or assumption or belief that was unspoken and not shared?
2. Have you ever been asked to commit an act of textual silence/violence for your workplace or schooling? Were you told "if you just leave that information out, things will be a lot easier" when you knew that you should be forthcoming with information? Freewrite about this experience and consider your decision based on your understanding of both ethos as well as ethics in written communication.
3. Research (i.e. take a look at the news, or do some digging on any national or international disaster) a case where textual silence caused the loss of human life.

References

1 Here are the respective answers to those questions: depends on if you want to ask; all; probably not.
Intercultural Communication (IC) is concerned with the ways individuals, organizations, and groups interact across cultural differences. We work in a world where corporate and non-profit organizations move toward transnational status at an ever-increasing pace. IC steps in as a sub-field of technical communication and focuses on how we can communicate between culturally varied groups while still adhering to each one’s social nuances and expectations. As technical communicators, our responsibility includes acknowledging the easy to see 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 (e.g., telling presenters to add humor to a presentation) 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.

I work on an intercultural team in a way that doesn’t offend someone’s values.

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 (Dong, Day, and Collaco, 2008). 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.
Should I be concerned with the role of my own culture?

The short answer is yes. While it is important for a technical communicator 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 (Wang, 2008). 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 technical communicator 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 as an Intercultural Technical Communicator. Managing the needs of various cultural norms requires the technical communicator 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?

References


Chapter 6: Document Design and Data Visualization

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Design Principles and the Rhetorical Situation

By Clayton Benjamin, University of Central Florida

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When creating a document, it is important to be familiar with the core design principles that function across most, if not all, documents. However, before we visit these core design principles, we should think back to the rhetorical situation in order to help guide us in understanding how the rhetorical situation helps constrain our design choices. Some key questions to ask ourselves are:

1. In what context will this document be used? If you were writing a car manual, would an electronic text make sense? Are people willing to put a tablet or computer under a car they are fixing? Or would a written manual with glossy, non-absorbent paper be better? How might the choice of delivery (the platform or material you use to communicate your message) be dependent on the situation you are addressing?

2. Who are you as an author? Many times in life you will find yourself operating inside a hierarchy of power within an organization. You need to know your role in the organization in which you are writing. If you are an engineer, you may be a subject matter expert (SME) who works with other engineers at your same level, with interns who are less knowledgeable than you and with less power and agency, and with management who oversee your work. The writing and document design you do as an SME changes the way you will address others in the hierarchy. Designing documentation and crafting a message to each of these different audiences is dependent on who you are as an author.

3. Who is your audience/who will be reading the document? If you are writing an email to a coworker, would you need to structure it as formally as if you were writing to a client? What expectations might a client have that your coworker would not? How does the person you are writing to change the message you are creating?

4. What is your purpose? Is your purpose to inform? To engage an audience to take some sort of action, such as answer a question, follow a procedure, or complete a task. The type of task you are asking the audience to complete may change how you organize the information you are presenting. For example, if you wanted to recruit recipients to donate to a fundraiser, what type of information might you put first and what might you put last?

5. What are you writing about/what is the topic? The topic of the document will affect how you design that document. Many types of documents are designed for specific topics. We call these genres. Some genres include proposals, instruction manuals, resumes, cover letters, emails, memos, letters, magazine articles, etc. Most documents you design during your career will be specific to a document genre. Each genre adheres to its own design guidelines dependent on the author, audience, and purpose. These guidelines are called genre conventions. When these conventions are broken, the audience becomes confused. You could think about this as navigating to a webpage and finding that it is missing a navigation bar on the top or the left side of the page. Where is it? Conventionally, we are used to the navigation on a webpage to be on the left side or top of the page. When this convention is broken, the audience becomes lost. It is best to follow the conventions of the genre, which as discussed earlier, is dependent on the topic you are writing about.

There are too many writing genres for this chapter to cover the design for each one. However, we can narrow all document design down to simple, easy to follow design principles that are consistent across all genres. These include principles for organizing information, formatting and designing effective pages, using fonts and color, and adding graphics, all of which will be introduced in the sections to follow.

Exercises

1. Using the writing project that you are currently working on in this course, answer the five questions above. If there are any questions that you cannot answer at this time, write a plan for how you will go about finding the answers to these questions.

2. Think of a time you had to craft a message to an audience with more authority than you. How did it change the way you designed the message? Think of a time you had to craft a message to an audience with less authority than you. How did it change the way you designed the message.
Organizing Information

By Clayton Benjamin, University of Central Florida

Learning Objectives

- Design documents, visuals, and data displays that are rhetorically effective, accessible and usable for specific audiences

Using the rhetorical situation when approaching a writing task should help us to make a good decision on which genre we should use. Sometimes the genre will help us to organize the information; however, often we will need to make our own decisions on which information is the most important for our audience. For example, we might have a lot of knowledge about how a car’s combustion engine works, but if the audience’s purpose is to replace the fuel filter, we do not need to include information on the combustion process. But they will need to know the specifics of the fuel filter, which tools are needed to replace the part, and the steps to take while replacing the part. We will also have to make decisions on how our audience will access the information. Typically, we want to afford the audience the ability to move seamlessly and quickly through the documentation. Therefore, we must organize and present our information in such a way that makes the documentation we design easy for the audience to scan and read. The easiest way we can assist our users is to align like information together and then decide which information supports the other information in a process of creating hierarchies.

Hierarchies

We often don't notice hierarchies because they are everywhere. Information is always organized around categories and headings. Think about your local fast food menu. When you visualize this menu, you notice that there is a header that reads ‘Value Meal’ in large, bold, energized lettering. Below it to the left you see a large number and to the right you see a picture of the meal. Displaying information in this fashion allows you to understand how the information is organized. You understand that a number 3 fits with the information listed underneath ‘Value Meal.’ Presenting information in this fashion makes it easier for the patrons at the restaurant to order food quickly and efficiently. Here are some general guidelines to follow in order to create hierarchies within your documents:

Headings

One useful way of distinguishing like information from other information is to use a heading that labels the information that follows it. Headings help the audience discern which information fits with other information and also allows the audience to scan the document quickly and efficiently. Here are some common principles for using headings:

- You will want to use a combination of headings and subheadings. Often these are called a

level 1 heading, level 2 heading, level 3 heading, and so on. The level one heading should be in a larger font than the level 2 heading. Subsequently, the level 2 heading should be in a larger font than a level 3 heading.
- Headings should be consistent throughout the document. This means that all of the headings throughout your document should share the same font. However, the headings in your document will change in size and style (i.e. bold, italics, etc.) according to heading level. Creating consistent heading levels allows the audience to move through the document and find information easily.
- Information in the subheadings should support information in the heading that precedes it.
- Create more space above the heading than below the heading. When you place a new heading in the document, there should be more white space above that heading in order to differentiate it from the previous heading. There should be less space after the heading, indicating that the information below it belongs to that heading.

Chunking & Headings

The best way to think about labeling and creating headings is through a process known as chunking: the process by which we separate and categorize information. You could visualize chunking as a process of sorting and piling information into stacks of like information. Chunking goes hand-in-hand with headings because headings act as the categories from which we build our piles. When you decide the different general categories your information fits in, you may use that general category as a heading for the information it categorizes. Once you create a general category, you should think about how the information in that category should be split into other subcategories. These subcategories should become your subheadings. You can continue this process of categorization for many subheadings. However, you will need to ask yourself how many heading levels are needed. You could think about the process of chunking and creating headings as creating an outline of the information you wish to present, and then incorporating the headings from your outline as headings in your document. See the table below for a visual representation of organizing through chunking and adding headers.

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<th>Cow</th>
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<td>Gecko</td>
<td>Turtle</td>
</tr>
<tr>
<td>Pig</td>
<td>Gecko</td>
</tr>
</tbody>
</table>

Barnyard Mammals

<table>
<thead>
<tr>
<th>Cow</th>
<th>Horse</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pig</td>
<td>Snake</td>
</tr>
<tr>
<td>Turtle</td>
<td>Gecko</td>
</tr>
</tbody>
</table>

Barnyard Reptiles

<table>
<thead>
<tr>
<th>Snake</th>
<th>Turtle</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gecko</td>
<td>Gecko</td>
</tr>
</tbody>
</table>

Numbering and Headings

Using numbers in your headings can be helpful to indicate which information goes with other information. In most technical documentation, we use an Arabic numeral followed by a period. Then, for each subsequent heading, we add another Arabic numeral and a period.
Headings and Parallel Construction

When titling your headings, be sure that you label them in parallel construction. Parallel construction means that two or more pieces of writing mimic one another’s syntax and punctuation. For instance, we could create a heading titled: *Creating Effective Designs*. Here we have a verb + adjective + noun. In the rest of the document we would want to replicate that syntax with the other headings. Another heading in the document might be *Using Persuasive Fonts*. When headings in a document are not in parallel construction, it takes the reader longer to understand the headings. Additionally, sometimes you may consider using questions as headings, such as in a how to manual. For example: *How do I use change fonts in Google Docs?* Or *How do I hide the formatting toolbar in Google Docs?* As a reader, we’d expect step-by-step directions after each question to resolve the question asked.

Exercises

1. How is information organized in this textbook? How are headings and hierarchies used to help users navigate their way through the text?

2. Find an example of a technical or professional document (i.e. instruction manual, report, etc.) on the web, and evaluate the organization of the document. How are headings and hierarchies used? Does the organizational system at play help the reader to move through the document easily? If not, how might the organization of the document be improved?
Formatting Pages

By Clayton Benjamin, University of Central Florida

<table>
<thead>
<tr>
<th>Learning Objectives</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Design documents, visuals, and data displays that are rhetorically effective, accessible and usable for specific audiences</td>
</tr>
</tbody>
</table>

As mentioned before, genre can help us organize information, but it may also help us to format the page correctly as well. When we speak of formatting, we are interested in the specific spacing, alignment, and placing and labeling of information. Previously we discussed headers and using spacing. In this section of the chapter, we will continue to develop the concept of spacing, more specifically known as whitespace, and then proximity, margins, alignment, font, color, and lists.

White space

As with headers, white space can be used to break up the page and make the information easier to scan and read. When designers speak of white space, what they are talking about is the blank space on the page between the different elements of the information (headers, infographics, paragraphs, titles, charts, tables, etc.). As mentioned during the section on headers, there should be more white space before the header than after the header because the reader lumps together information with less white space, combining those elements together. This principle is known as proximity. When elements on the page are closer to other elements, the reader understands that those elements are related. Conversely, if there is a significant amount of white space between elements, readers understand information to be separate from other information. Therefore, where you place elements with regard to other elements alerts the reader to which information belongs together.

Part of creating an easy to read document is effectively using white space. Again, you will want to understand how you want to organize information in order to use white space effectively. Remember to ask yourself which information is similar to other information. Once you've decided which information goes together, be sure that like information is closer in proximity than unlike information.

Margins

A specific type of white space is margins. We use margins to help frame information. Typically, most of the writing you perform will be done on 11” x 8 ½” pages and you will want to set the margins to 1” from the left, top, right, and bottom of the page. However, you should consider whether the document you are writing will be bound. If the document is to be bound, you may want to set the margin 1.5” from the left to account for the binding.

Alignment

Alignment plays a special part in the readability of your document. Alignment refers to how the
text and elements are lined up horizontally and vertically line by line. You want all of your alignments to be standardized horizontally and vertically.

Text Alignment

There are typically four types of text alignment: left, right, centered, and justified.

- **Left Alignment**: All the information aligns flush/vertically to the page’s left side. Sometimes you will also hear left alignment referred to as a ragged right alignment because the information on the right does not align vertically and is hence ragged.
- **Right Alignment**: When information is aligned right, it means the information aligns flush with the page’s right side.
- **Centered Alignment**: All the information on the page is horizontally aligned to the center of the page. Both the left and right sides of the page are ragged. Be careful with center alignment. Because both sides of the page are ragged it can be extremely hard to read. As a rule, never center align an entire document. Centering can be useful for titles and subtitles.
- **Justified Alignment**: Space is added between the words on the page so that there is vertical alignment on both the left and right sides of the page. Newspapers usually use justified alignment.

For most documents you design, you will use left alignment. For many people in the Western part of the world, right and centered alignment makes the texts hard to read because we read left to right. When text is right aligned, and the reader gets to the end of the page, it is hard for the eye to gaze back to the left side of the page and discover where it left off. When you decide which type of alignment to use for your document, you should use that alignment throughout the entire document in order to stay consistent.

Element Alignment

As with text alignment, you will also want to align other elements in the document to a horizontal line as well. For instance, if you have a document with many charts and graphs, you should consider whether you want to align them in the center of the page, or if you want to align them to the left or right. Typically, you want these elements to be aligned with the same vertical line throughout the document. Below is an example of the first quarter of a resume. Note how all of the information aligns in a horizontal and vertical fashion including the headings, dates, and bullets.

Font

Though there are many different types of fonts available in software created for document design, do not be fooled: you will usually want to use standard fonts like Times New Roman, Georgia, Arial, and Verdana. There are other fonts that you see frequently as well, such as Lucinda, Geneva, and Tahoma; however, the first four listed are the ones that are safest for designing documents. These fonts are considered “safe” because they can be used across different web browsers and operating systems with ease, meaning a wider audience will have access to the materials that you create. These fonts are also clean and pleasant to look at. However, you should be aware that these fonts fall under two classifications: serif and sans-serif fonts.

- **Serif Fonts**: Fonts that have slight decorations at the end of letters. Times New Roman and Georgia are examples of serif fonts.
- **Sans-serif Fonts**: Fonts with crisp, clean endings to their letters. Arial and Helvetica are examples of sans-serif fonts.

Currently many will debate about when to use serif or sans-serif fonts. However, most agree that if the information you are delivering will be read on a screen that sans-serif fonts are more readable. Additionally, if the information you are delivering will be read on paper (printed) then a serif font is easier to read.

Color

Sometimes it is a good idea to add color to your documentation; however, do not go overboard on color. Sometimes using color for heading fonts may be a good idea, but often reading entire pages in color can strain the eye. It is recommended that you use color sparsely and for a specific purpose.
There are three types of colors: primary, secondary, and tertiary. The primary colors are red, yellow, and blue. When you mix two of these colors, you get the secondary colors orange, green, and purple. When you mix secondary color with a primary color, you get tertiary colors such as orange-yellow, purple-red, and green-blue.

When choosing to use more than one color in your document design, you want to choose colors that are harmonious and pleasing together. There are three ways to create color harmony:

- Analogous Harmony: Colors are analogous when they are adjacent to one another on a color wheel. For example, green, yellow-green, and yellow are analogous.
- Complementary Harmony: Colors are complementary when they are directly across from one another on the color wheel. For example, blue and orange are complementary colors.
- Natural Harmony: Nature is pleasant to the eye and can often be used as a jump off point for creating color harmony. To create natural harmony, find a picture from nature and copy the colors in the photo. This creates color harmony that may not technically fit into a color formula, but none-the-less is pleasing to the human eye.

Lists

Lists are used to highlight like information. Usually, in technical documentation, you will want to use a lead-in before listing information. The following sentence is an example of a lead: For instance, these recommendations (examples) for lists come from https://www.prismnet.com/~h-cexres/textbook/lists.html:

- Use lists to highlight or emphasize text or to enumerate sequential items.
- Make list items parallel in phrasing.
- Make sure that each item in the list reads grammatically with the lead-in.

- Use a lead-in to introduce the list items and to indicate the meaning or purpose of the list (and punctuate it with a colon).
- Avoid using headings as lead-ins for lists.
- Use similar types of lists consistently in similar text in the same document.

There are two different types of lists you will create for technical documentation: a bulleted list and a numbered list. Bulleted lists are referred to as an unordered list, meaning that there is no sequential order to the importance of the items listed. Numbered lists are referred to as ordered lists because the sequence of the information listed is important. Often in technical documentation, you will use numbered lists to direct a user to complete a process. You can think about numbered lists as step-by-step directions, whereas bulleted lists are simply list items.

Exercises

1. What questions would you need to ask as a designer to create a consistent how-to-manual? Make a list of all the decisions you would have to make.
2. You are responsible for designing a flyer to recruit both students and faculty to attend a speaker on campus. Knowing you have two audiences to reach with one flyer, what might you do? Now, if you were designing two different flyers, how might they change and differ from one another?

When choosing to use more than one color in your document design, you want to choose colors that are harmonious and pleasing together. There are three ways to create color harmony:

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Web Design Basics
By Clayton Benjamin, University of Central Florida

Learning Objectives
• Design documents, visuals, and data displays that are rhetorically effective, accessible and usable for specific audiences

There are many lessons from document design that we can translate into web design. Namely, we want the pages to remain consistent. Consistency means that each page looks similar to the page before it. We can think about a webpage/site as a writing genre with rules and conventions that translate across most webpages/sites. Traditionally, web pages are chunked into four parts: a header, a navigation bar, a body, and a footer.

<table>
<thead>
<tr>
<th>Header</th>
</tr>
</thead>
<tbody>
<tr>
<td>Navigation</td>
</tr>
<tr>
<td>Body</td>
</tr>
<tr>
<td>Footer</td>
</tr>
</tbody>
</table>

Knowing that a webpages/sites have a consistent design, we do not need to reinvent the wheel. We can use this simple design to communicate most of our information needs via the web. However, what differs from a traditional document to a webpage/site is the way we expect an audience to interact with it. Therefore, as designers, we need to be more conscious of the user experience. In web design, when we speak of the user, we mean audience. We must ask, how do we want the user to navigate through our webpage? What might the user need to know? How do we want the user to feel while using the webpage?

Planning
Because webpages hyperlink and allow the user more freedom to click through information in the order they find suitable to themselves, we need spend more time planning how we will organize the information and how we want users to interact with that information. In this portion of the chapter we will cover the following concepts: wire framing, navigation, and web-templates.

Wire Framing
When presenting information online, we need to think critically how we organize that information so it is easy for the user to retrieve and comprehend. One way to think about this is to translate the chunking and heading creation you perform in regular document design into a wireframe, a type of flow chart. In document design, we usually create an outline like this:

Title
1. Heading
   1.1 Subheading
2. Heading
   2.1 Subheading
   2.1.1 Subheading
   2.2 Subheading
   2.2.1 Subheading

However, in web design, we could think about each of the headings in the outline as a separate webpage, and build a hierarchy of those pages with the aid of a visualization tool – a wireframe. A wireframe is the visual map showing how all the pages relate to one another in the website. We also refer to this as a website map. Here is how we would wireframe or map the pages of the previous outline:

```
Title
  1. Heading
    1.1 Subheading
  2. Heading
    2.1 Subheading
    2.1.1 Subheading
    2.2 Subheading
    2.2.1 Subheading
```

Now that we have the basic wireframe/website map, it is easy to visualize how our website would be designed. The Title page would be our Homepage. A homepage is the first page of your website and acts as the portal to the site. From the homepage the user should be able to navigate to all the other information on the site. From our example homepage, we would need links to the 1. Heading and the 2. Heading pages. These pages would be our first tier pages. Then we would need a link from the 1. Heading page to the 1.1 Subheading page and links...
Taking time to draw a wireframe for your website before you create the website will save you time and energy because it allows you to visualize how information on each page relates to information on other pages. This will help you to create the navigation needed for your website.

**Navigation**

When a user opens a webpage, they need a way to maneuver through the website. This can only be done through a hyperlink. Hyperlinks are words, phrases, or images that a user can hover a mouse (or finger) over and click, resulting in the user being shown a new page. An entire website is held together by hyperlinks. It is your job as a web designer to create a path for the user that links the site’s webpages together. This is referred to as navigation. There are a few ways to create navigation on your pages: navigation bars, bread crumbs, inserted hyperlinks, and site specific search engines.

**Navigation Bar**

The navigation bar is probably the most familiar way to create navigation in a webpage. The navigation bar remains the same on every page of your website and is normally located vertically down the left side of the webpage or horizontally across the top of the webpage. The navigation bar is split into different tabs/buttons. These tabs/buttons then link to other pages in the website. Normally you will want to include tabs/buttons in the navigation bar that link to your Tier 1 pages. In the previous example our Tier 1 pages were **Heading 1** and **Heading 2**, so the navigation would look like this:

![Navigation Bar Example](image)

Additionally, you will sometimes want to create what is called a dropdown navigation bar. When a dropdown navigation bar is used, the user hovers the mouse over a tab and next to it a second tier webpage link appears. A dropdown navigation bar is beneficial because it allows the user to access Tier 2 & 3 pages without navigating to the Tier 1 page first. Dropdown navigation can be used for both horizontal and vertical navigation bars. Here is an example of a vertical navigational dropdown menu:
Breadcrumbs

Breadcrumbs are a special type of navigation, positioned at the top of the page, which allows the user to keep track of where they are in a website. It keeps track of the path you took to arrive at a given webpage. Each breadcrumb is hyperlinked to the page in the hierarchy. For example, if you were in a third tier page, it would list the second and first tier pages you traveled through to get there. Then from that third tier page you would be able to back track either directly to the first tier page or to the second tier page. Below is an illustration of breadcrumbs, which function as useful visual reminders for the user of how they arrived at a webpage.

Inserted Hyperlinks

Hyperlinks can be added to any piece of information on any page of your webpage to guide the user to other webpages in your website or to external websites. Hyperlinks may be useful if you are referencing other material outside your website, or if you are referencing information on a specific page of your website that is not covered on the specific page you are hyperlinking from. For instance, if you built a glossary webpage for your website, you might hyperlink glossary terms in your webpages that, when clicked on, bring the user to your glossary page.

Site Specific Search Engines

When creating large websites, sometimes it will be easier for the user to use a search engine to find the information on the webpage. A search engine is a tool that users can type key terms into and then select search. The search engine then searches the webpages of that specific site to locate webpages that correspond to those specific search terms. For smaller sites, a simple well thought out navigation bar should suffice.

Webpage Templates

Just like designing pages for a document, you want to keep all the pages in your website consistent. As stated previously, you will want to have a consistent header, navigation bar, and footer. One way to create consistency across your webpages is to create a webpage template. The template defines the size of each element on the page (header, navigation bar, footer, and body) and then is used as the basis for every page you design. The only portion that changes from page to page is the content in the body. The body of the page is where you add page headers, text, and images. You will want to apply the document design principles discussed in this chapter when adding content to your pages.

Conclusion

So far in this chapter, you learned the basics of document and web design. As demonstrated throughout the chapter, your position as an author and the audience you are trying to persuade/influence/inform will change the way you craft and design a message. By applying simple rules for organizing information, such as chunking and adding headers, you build your authority as a writer because sorting the information and combining the pieces that go together demonstrate that you fully comprehend the information you are trying to communicate. Furthermore, when you standardize document formatting and keep the formatting consistent throughout the entire document, you demonstrate that you respect your audience and their time because the formatting allows your audience to quickly advance through your document and find the information pertinent to them.

Exercises

1. If you were to create a professional webpage about yourself, what would it look like? Think critically, which information would you choose to display about yourself and why? Draw out your website's wireframe and then create a webpage template.
Data Visualizations

By Katherine McGee, University of South Florida

Learning Objectives

- Design documents, visuals, and data displays that are rhetorically effective, accessible, and usable for specific audiences
- Recognize ethical, legal, and cultural issues in business and the professions

Think of the maps you see produced by the television station or website from which you get your weather information. While the 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 accompanied by a map. That map may simply have numbers on it, but it also likely has color added to it, 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; the dark red color of that area simply reinforces the idea, making it easy for us to quickly absorb information without having to process the actual posted high temperatures.

Sometimes it is beneficial to add visuals into your technical writing, especially if there are a lot of numbers or other types of data involved. Data visualizations such as graphs, charts, tables, and maps organize and communicate information in a way that is accessible to multiple audiences. Depending on the type of visualization, the visualization can help the user look up specific values or identify patterns hidden within the data.

There are many different types of data visualizations that can be and are 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 patterns 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.

Sometimes, more complex visualizations are necessary in order to identify the patterns hidden within the information. Consider, for instance, some of the patterns that David McCandless identifies in the visualizations he presents in his TED Talks (http://www.ted.com/talks/david_mccandless_the_beauty_of_data_visualization?language=en) video, or McCandless’s visual depiction of 20th Century Death (http://www.informationisbeautiful.net/visualizations/20th-century-death/), where he breaks down the number of deaths according to categories, such as Humanity, and subcategories, such as War, Drugs, and Air Pollution. By breaking down causes of death in the 20th Century Death chart, McCandless enables readers to visualize the impact that diseases such as Smallpox, Tuberculosis, and Whooping Cough had during the 1900s, and compare them to other causes of death such as Road Traffic and Air crashes.

Purpose of Data Visualizations

According to Stephen Few, the purpose of data visualizations “is to communicate important information effectively” (9). As technical communicators, it is our job to use design in order to help our readers understand what the information says the numbers say (9).

More specifically, the purposes of tables, graphs, and other types of data visualizations are to

- Clearly indicate how values relate to one another
- Represent quantities accurately
- Make it easy to compare quantities
- Make it easy to see ranked order of values
- Make obvious how people should use the information

(Few, “Data Visualization for Human Perception”)

An extensive description of every type of data visualization would be beyond the scope of the article; there are entire books written on this topic, and if you want to design in-depth, effective visuals, you should read more of Stephen Few’s or Edward Tufte’s works. 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, “lists of data presented in a system of rows and columns” (Dobrin, et al), 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 such as depicted in Table 1:

<table>
<thead>
<tr>
<th>Student ID</th>
<th>Exam 1</th>
<th>Exam 2</th>
<th>Exam 3</th>
<th>Homework</th>
</tr>
</thead>
<tbody>
<tr>
<td>12345</td>
<td>97</td>
<td>75</td>
<td>82</td>
<td>95</td>
</tr>
<tr>
<td>23456</td>
<td>79</td>
<td>79</td>
<td>81</td>
<td>90</td>
</tr>
<tr>
<td>34567</td>
<td>45</td>
<td>78</td>
<td>83</td>
<td>100</td>
</tr>
<tr>
<td>45678</td>
<td>99</td>
<td>98</td>
<td>100</td>
<td>100</td>
</tr>
<tr>
<td>56789</td>
<td>25</td>
<td>75</td>
<td>82</td>
<td>70</td>
</tr>
</tbody>
</table>

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.

Design Tips for Tables

You’ve probably seen a lot of tables in your lifetime, and some have probably been easier to read than others. The following are some guidelines for designing tables effectively:

1. Label each row and column clearly so that it is easy to look up values.
2. Avoid using too much ink. If you include solid lines between all items, the table can become...
more difficult to read (Few, *Show*, 160-61). See, for instance, Table 2, with the same information redesigned to have lines between each item. Notice that the table appears to be more cluttered than it did previously, even though it still has the same amount of information; this amount of clutter will increase if the table has more items. If necessary, light fill colors (Few, *Show*, 163) such as those used in Table 1 can be used to allow the reader to scan across lines more effectively.

**Table 2.**

<table>
<thead>
<tr>
<th>Student ID</th>
<th>Exam 1</th>
<th>Exam 2</th>
<th>Exam 3</th>
<th>Homework</th>
</tr>
</thead>
<tbody>
<tr>
<td>12345</td>
<td>97</td>
<td>75</td>
<td>82</td>
<td>95</td>
</tr>
<tr>
<td>23456</td>
<td>79</td>
<td>79</td>
<td>81</td>
<td>90</td>
</tr>
<tr>
<td>34567</td>
<td>45</td>
<td>78</td>
<td>83</td>
<td>100</td>
</tr>
<tr>
<td>45678</td>
<td>99</td>
<td>98</td>
<td>100</td>
<td>100</td>
</tr>
<tr>
<td>56789</td>
<td>25</td>
<td>75</td>
<td>82</td>
<td>70</td>
</tr>
</tbody>
</table>

3. Use a legible font, and use that same font throughout the table (Few, *Show*, 177).

**Graphs and Charts**

Graphs and charts 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.

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According to Ask.com, the difference between a graph and a chart is that “Graphs are meant to be focused on the data in question and how it trends. Graphs have exact numerical figures shown on axes, usually organized on the left and bottom of the graph,” and “Charts are designed to show differences in things like surveys and figures in a more aesthetically pleasing way. Charts have numerical figures in line or popping out of the visual representations themselves.”

**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.

**Design Tips for Graphs and Charts**

1. Label your axes clearly.
2. If an axis contains quantitative information (numbers that have meaning) and shows only positive numbers, then the axis should begin at 0. In some rare cases, it is acceptable to use a different starting point, but if you are starting with a number other than 0, make sure that you mark that clearly. Some designers use varying axes to distort information, which is unethical.
3. Make sure that the spacing is even down columns and across rows. Numerical increments should also be equal down columns and across rows. Using unequal increments is another way to distort information.

**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, which Robin Williams explains in detail in *The Non-Designers’ Design Book* and Danielle Nicole DeVoss describes more briefly, with examples, in this video ([https://www.youtube.com/watch?v=qa3tg3NeIY&feature=youtu.be](https://www.youtube.com/watch?v=qa3tg3NeIY&feature=youtu.be)).
Contrast
When we write essays in Microsoft Word, the default colors 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.

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 see large amounts of text that are right aligned. For a more in-depth discussion of alignment, look at Clayton Benjamin’s article “Formatting Pages.”

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 (e.g. the Student IDs in Tables 1 and 2), they can be left aligned. Most other information should be left aligned (Few, Show, 171).

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 (e.g. the Student IDs numbers in Graphs 1 and 2) are placed as close as possible to that particular student’s scores.

Problematic Chart Practices
One type of chart that is particularly popular is the pie chart. While some use them often because they allow the audience to see a basic part-to-whole relationship, they are also often criticized. Few, for instance, indicates that pie charts are ineffective because “[they] [encode] values as visual attributes . . . that we cannot easily perceive and compare” ("Data Visualization"). In other words, a quick glance at a pie chart informs us of general ratios, but it is often difficult to see the difference between amounts. For instance, if one section represents 20% and another represents 23%, the average human eye cannot discern the difference.

Another issue to be aware of is the use of 3D, which many also consider ineffective because the effect renders the information difficult to read accurately. Few indicates that 3D “cannot be applied effectively to graphs on a flat surface (e.g., a page or computer screen), which relies on illusory cues of light and shadow, occlusion, and size to simulate depth. Even if 3-D posi-
tion could be used effectively on a flat surface, it is not an effective attribute to use in table and graph design because our perception of depth is weak compared to our perception of height and width” (Show 71).

Look at this graph (http://www.originlab.com/doc%5Cen/UserGuide/images/3D_Bar_Graph/Image149.png), for instance. While the numbers for 2009 are readable, the other values are not as easy to discern. Compare, also, the two graphs presented in this article (http://consultant-journal.com/blog/use-3d-charts-at-your-own-risk). As the author indicates, the bars don’t touch the wall, which makes the data difficult to read (“Use 3D”).

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.

Exercises

1. Type “ineffective charts,” “ineffective graphs,” “unethical charts,” or some version thereof into Google Images. Find two or three differently-designed graphs and charts and discuss why the data visualizations are not effective.
2. Find a textbook, report, or other document that includes some sort of data visualization. What types of information did the author choose to visualize? As a reader, how does the visualization help you to better understand the information presented?
3. Consider those same data visualizations, this time looking at how the writer talks about the visualization. How does the writer introduce the visualization within the text? Where is the visualization placed in relation to its textual reference?

References


Additional Resources

The following resources help you to create charts and graphs:

- Online ChartTool: http://www.onlinecharttool.com/
- Chartgo: The simple chart maker: http://www.chartgo.com/
Creating ‘Viral’ Impressions: Composing Infographics for the Classroom and Work Space

By Maggie Melo, The University of Arizona

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<th>Learning Objectives</th>
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The use and spread of infographics has gained viral traction in the professional realm. The term “infographic” is a combination of the two words “information” and “graphic.” The infographic caters to fast-pace, “bottom-line” types of audiences by distilling complex information into a single image. Although infographics can be used in a variety of settings, they fare particularly well in the professional environment during business meetings, training sessions, and sales pitches. In fact, infographics have even become a popular means for job seekers to present their resumes. The beauty of an infographic, in contrast to a traditional alpha-numeric genre, is its ability to quickly make a lasting impression on audiences by appealing to their visual aesthetic.

Once you enter the professional world, consider re-envisioning traditional alpha-numeric genres (e.g. the memo or business report) into more visually impactful genres like the infographic. Below are a few best practices you can leverage as you begin developing an infographic. These best practices can be applied to any genre that is typically created alpha-numerically.

The Invention Process

If you are apprehensive about getting started on your infographic, be assured that the development process replicates a process that you are already familiar with: the writing process. You will notice much overlap between the way you approach an academic essay and the way you approach the creation of an infographic. You may also notice that creating an infographic requires the same amount of vigor and time that an academic essay would require.

Before thinking about creating infographics as a professional in the work space, you should begin thinking about ways to integrate the use of infographics as a student in the classroom. Identify opportunities to transform alpha-numeric assignments into infographics for a more visually impactful presentation (I would, of course, ensure this route is okay with your professor beforehand). For example, Figure 1 depicts an infographic representation of a controversy analysis essay. A controversy analysis essay explores the multiple perspectives governing an issue and typically takes the form of an alpha-numeric essay. The creator of the Figure 1 infographic, Isha Parol, chose rape culture as her controversy for analysis. When analyzing the infographic, you will notice that it embodies some of the key features that a traditional academic possesses such as evidence, organization, and an (counter) argument. Infographics and traditional essays have many overlapping similarities. Such similarities provide you, as the student, with opportunities to create infographics in lieu of or in conjunction with writing assignments.

As you begin working through essay assignments or presentations, consider the possibility of leveraging the visual power of an infographic. Parol’s manipulation of color, statistics, and layout creates a “story” of rape culture that is powerfully complex, yet is conveyed simply. Before Parol created her infographic, she spent some time pinning down the story she wanted to illustrate.

Your Infographic’s “Story”

What story do you want your infographic to tell? Perhaps you are striving to illustrate an increase in company earnings or maybe you have been assigned to trace your relationship with reading and writing (i.e. a literacy narrative)? To better grasp the role of the story in relationship to your infographic, you can think about it as operating similarly to a concept you are familiar with: a thesis. The story (or thesis) acts as a cohesive and driving force to bring all elements of your infographic together. Take a look at the infographic below created by a student, Kate Harris. Harris presents her infographic’s story, “The Syrian Civil War,” in a linear fashion. It’s simple yet effective.
Why are you creating an infographic? Like a written text, infographics stem from a need. Maybe you need to create an infographic in order to complete a class assignment or perhaps you are using the infographic to present training content to new hires; the rhetorical situation governing the need for your infographic will ultimately guide the development of your infographic’s story. Your infographic’s audience, context, and purpose (i.e. the “rhetorical situation”) will help guide your story’s development. Setting some time aside to identify the audience, context, and purpose will be useful. For example, I have created an infographic entitled “The Anatomy of the Viral Video” (Figure 2) before developing the infographic, I took note of the context governing the infographic by identifying the components comprising a rhetorical situation: Infographic: “Anatomy of the Viral Video”

Audience: English 1101 and 1102 students.

Context: I am introducing a unit on the rhetorical features of viral media. At the end of the unit, students will be creating their own viral video on a chosen controversy.

Purpose: To introduce the interrelated characteristics of a viral video.

A quick sketch of your infographic’s rhetorical situation will help support its overall development. For example, when envisioning your infographic’s audience, your infographic’s page size becomes important. Although it may seem insignificant, this small detail can derail the presentation of your infographic to an audience expecting hard copies. (As a side note, if you plan on distributing your infographic, ensure that the size is either “legal” or “letter” so that you or your audience can print it out.) Once you have vetted the rhetorical situation contextualizing your infographic, the next order of business is gathering support for your infographic’s story.

Think of infographics as “data-driven” visualizations. Unlike an ordinary image, an infographic operates by both pleasing the eye while simultaneously informing the brain. The support you need to collect for your infographic (as you probably have guessed) is comparable to the evidence you would gather for an essay you would write. The type of data you will need for your infographic depends on, once again, your infographic’s rhetorical situation. In other words, the data you would collect as a business professional will vary from the sources you would collect as a student. It is crucial to gather the right type of support to establish the credibility of your infographic. For example, the aforementioned infographic “The Anatomy of a Viral Video” (Figure 6) is intended for a scholarly audience: college students. The sources I used to support the infographic included popular websites and scholarly research. (In terms of how to integrate data into your infographic, we’ll touch more on that in the “Creating and Revising Your Infographic” section.)

First Impressions: Shapes and Colors

Molly Bang’s Picture This: How Pictures Work explores the powerful impact that the manipulation of simple shapes and colors can have on readers. Through the positioning and coloring of various shapes, Bang leads readers through a series of visual scenarios of the fairy tale “Little Red Riding Hood” to demonstrate the authority of shape placement and hue. With Bang’s exploration of shape and color in mind, do remember: the images, shapes, and colors used in the infographic are the main features of the story you are conveying. Text should be used sparingly in an infographic; therefore it is important to be deliberately decisive with the visual choices you implement. The guiding principles of the visual arrangement of shapes and colors help to bring us to the next part of the invention process. Ask yourself: how do you want to represent your infographic’s story visually? If that question is too broad to answer, consider asking yourself this question first: what feelings do I want my infographic to evoke? If you are still stuck, you can consider free-writing or perhaps performing the activity below.

Activity: “Three Shapes to Tell One Story”

Objective: To tell a story through the manipulation of simple shapes and colors.

Materials: Paper of various colors, scissors, and perhaps a writing utensil for tracing.

Directions: Choose one of these words: love, shame, or comfort. These words represent abstract concepts that are complex and challenging to convey with words alone. Moreover, these words are also emotionally evocative. With your chosen word, create a visual image that tells a story representative of your word. You can only use three shapes: circle, triangle, and rectangle. As you develop your word’s story, remain cognizant of the strategies and decisions you are making.

Once you are done, feel free to look at some of the image depictions below. Can you guess which image represents which word? Now that you have an increased understanding of the evocative power of shapes and colors, try practicing the way you wish to tell your infographic’s story with this activity. This activity will help generate a basic conceptualization of your infographic. Once you begin developing your infographic on the computer, don’t feel limited to the shapes or colors from the activity—this activity is a part of the invention process.
Creating Your Infographic

You are ready to develop an infographic! Choose from a variety of sites such as Piktochart or easel.ly, or from other programs such as PowerPoint. There are several sites that are free of cost. Peruse through various sites to determine which site best suits your infographic’s development. Once you have made your decision, play around with the site. Get a feel for the available design templates, how to place shapes on your digital canvas, how to change shapes and colors, and (most importantly) how to save and share your infographic. Your familiarity with the site’s functionality will help alleviate some of the stresses that come with working with a foreign medium while concurrently trying to develop your story.

It is common to feel overwhelmed with your infographic’s creation, especially if you are using an infographic website for the first time. Remember to leverage your story and understanding of shape manipulation to guide you through what would be considered “writer’s block.” If you still feel stuck, creating an outline or a sketch of your infographic on a separate sheet of paper may help. Although you may be tempted to create a robust outline filled with many figures, images, and text, remember the beauty of the infographic comes from its ability to make a quick visual impression. You should envision how persons would interact with your infographic if they were to approach it on a bulletin board, or break room. In other words, how would viewers interpret your image in spaces where they are constantly on the go? Simple outlines and sketches can be done anytime during the creation process; they will serve as helpful road maps for the formatting of your shapes, images, and notably for the integration of data.

As mentioned, the difference between an ordinary image and an infographic is that an infographic is an image driven by data. While a major function of the infographic is the visual impression it makes, its success is ultimately attributed to the incorporation of statistics and figures. Re-visit the infographics presented thus far in the webtext and pay particular attention to the way the statistics inform the function and meaning of the whole infographic. When the statistics of the infographic are read, it provides readers with a better understanding of the infographic’s story. The infographic “Anatomy of the Viral Video” (Figure 6) can be analyzed in terms of the way data is depicted. Upon first impression, the infographic seems strange but provocative nonetheless. Readers are able to make sense of the image’s peculiarity by reading the integrated evidence. In this instance, each piece of datum corresponds to an image on the viral video’s “body.” The brain represents the “memorable” nature of a viral video, while the shoes indicate the movement of viral videos, for example. Before reaching this final layout, the infographic underwent many revisions—considering there isn’t a standard way to integrate data into an infographic. As the creator of an infographic, you have the license to integrate sources as you see fit. The tricky part is finding the balance between the visual and data components of the infographic: you do not want one more prominent than the other but instead want them to co-exist symbiotically. Balance will come with some practice, revision, and peer feedback.
Revising Your Infographic

The revision process for your infographic emulates the same process for a piece of writing and includes peer revision. Once you have created a draft that contains major elements of your infographic such as figures, prominent shapes and images, and text, set up some time to meet with a couple of colleagues for feedback. Here are a few suggestions to contemplate when eliciting feedback for your infographic:

- Give reviewers uninterrupted time with your infographic—about two to three minutes. A reviewer should be able to glean the gist of your infographic pretty quickly.
- Resist the temptation to tell reviewers what they should be seeing or what your infographic’s story is. You have devised a successful infographic if your reviewers arrive to your conceptualization on their own.
- If reviewers are having a difficult time providing feedback, ask: “What emotions does the infographic evoke?” and “What story do you think the infographic is striving to convey?” These questions will provide helpful indicators to gauge if your infographic is operating the way you envisioned.

As you revise your infographic, do consider the way you imagine presenting your creation. Begin storing all of your infographics in a central location (either in a digital or physical repository) so that you may refer to them at any given time. Leveraging the infographics you have created during job interviews, performance evaluations, and meetings is a sure way to leave a lasting impression.

Exercises

1. Using an infographic that you find on the web, write a short paragraph (2-3 sentences) describing the story that the infographic is telling. Then, compose a second paragraph that explains how you know this information; in other words, what is included (or excluded) in the infographic that helps you, as a reader, understand the infographic’s story?

References

When and How to Use Research for Data Visualization

by Gyasi Byng, University of Rochester

Learning Outcomes

- Design documents, visuals, and data displays that are rhetorically effective, accessible and usable for specific audiences
- Recognize ethical, legal and cultural issues in business and the professions

Our attention spans have decreased since the advent of digital technology and social media. When information or entertainment can be accessed within milliseconds, it seems highly illogical to parse through pages and pages of books or even to listen to a lecture longer than five minutes. In the 2010s, we want information to be bite sized and easily digestible. We want fast food, not a leisurely four-course dinner. Whether or not you lament the current state of the American attention span, the fact remains that quick and easy information makes a lasting impression. And much like fast food, what is quick and easy is not always going to be good for you. Graphs, charts, tables, and figures give us the information we need at a swift rate; however, the way that information is presented is not always truthful. Think about the world map—despite the fact that Africa is the second largest continent, the majority of world maps do not give that impression. Yet this image of Africa is ingrained in our psyche and most people consider this image of Africa to be the true geographical state of the landscape. The image of the map precedes the reality of the continent itself (Baudrillard, 1981). This is not to say that all visuals are horribly misleading; however, it is necessary to consider how the form, layout, and design of those visuals could negatively impact or influence the audience.

Since visuals allow the audience to take in a great deal of information in a short amount of time, we must have a distinct purpose or goal in mind for our visual. Oftentimes, a visual aid seeks to do one of two things: explain or explore. When a visual seeks to explain, it is most likely directing the audience down a path the presenter has thought of beforehand. If the visual’s aim is to explore, then the visual presents information in such a way that allows the reader to ask and answer his or her own questions through the visual. For example, a visual that seeks to explain might be intended to demonstrate cause and effect. A simple line chart can easily demonstrate that “A” action occurred and “B” result is the effect. An explanatory visual often seeks to persuade the audience to see the validity of the presenter’s argument or position. Should you want your audience to explore, to ask questions and derive answers, a choropleth (a shaded or color coded map) or pie chart might be the best way to present the information without steering your audience toward a certain outcome or mode of thinking. The exploratory visual mainly seeks to inform the audience and let them reach their own conclusions regarding the topic.

In both cases, explaining and exploring, gestalt principles are in effect. Gestalt principles “describe the various ways we tend to visually assemble individual objects into groups or ‘unified wholes’...Gestalt is the interplay between the parts and the whole” (Wong, 2010, p 863). Essentially, gestalt principles allow our minds to organize the information displayed on a visual aid. These principles accentuate importance and downplay other unnecessary information. Further-more, gestalt principles reduce visual noise, racket, and clutter by helping to establish connections between the different pieces of information being displayed. Images allow the audience to infer, establish, and decipher relationships between information. Due to the impact of images, we must maintain an ethical standpoint when constructing and revising our visual aids. Since effective, ethically-designed visual aids are dependent on the interplay between the visual and the text, unethically-constructed visual aids are “those designed to discourage accurate reading and thereby limit the conveyance of negative information” (Kienzler, 1997, pp. 173-176). This is when the person creating and exhibiting the visual implies a relationship between the data that may not be present.

How could any visual aid, be it a chart, graph, or timeline, mislead or deceive the audience? Let’s look at a simple example in order to see how visuals can distort the truth or confuse the audience. Consider the shape and layout of a Venn diagram. The circles overlap to suggest that there is a common denominator between two or more different things. Imagine a Venn diagram consisting of two circles. The words “Fans of Superman” are written in one circle, and the words “Fans of Batman” are written in the other. In the area where the circles overlap are the words “Fans of Wonder Woman.” Given the information presented by the Venn diagram, the audience might assume that fans of Superman and Batman both like Wonder Woman. Perhaps the speaker’s words might lend credibility to the assumption that Superman and Batman fans all like Wonder Woman, but the ultimate goal of a visual aid is to convey the a great deal of information in a compact and succinct way. If the speaker has to explain or justify the image, then something is wrong. The visual aid does not help but hinders the speaker’s progress and effectiveness.

Here are some questions you may want to ask yourself when you are preparing your visual aids:

1. Is this type of visual aid the best one for relaying my information?
2. What is the goal of this visual aid? Am I trying to explain or explore?
3. Does the visual aid contain enough information to support my point?
4. Does this visual aid accurately display logical inferences between different data?
5. Does the layout, color scheme, or design of the visual aid misrepresent the information or confuse the audience?

Exercises

1. Search the web for a data visualization that you find appealing. You might search for a data visualization that deals with a particular topic that you find interesting, or you might examine data visualizations on Google Images until you find one that interests you. Based on what you know about data visualizations, analyze the data visualization that you have chosen. Is the chosen data visualization the best one to relay the information being displayed? Why or
why not? What is the purpose of the visual aid? How well does the data visualization fulfill its purpose? How might this data visualization be improved?

2. Using the same data visualization that you analyzed in the previous exercise, turn your attention to ethics. Is the information contained in the data visualization presented in an ethical and accurate manner? How so? Is there any information presented in the data visualization that might be misinterpreted?

References
Scientific Posters

By Candice A. Welhausen, The University of Delaware

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<tr>
<td>• Compose professional/workplace documents and oral presentations for multiple audiences and specific purposes using appropriate technologies</td>
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Scientific posters are a common type of genre created by researchers in science and engineering-related fields to communicate information about a study, usually to other experts. As a student, you may be assigned a scientific poster in a technical communication or science writing course, or in a class that focuses on writing in your discipline.

Scientific posters give readers a ‘visual overview’ of a particular project. In contrast to primarily text-based documents like research or lab reports, posters are visual-dominant. That is, they rely primarily on visuals — illustrations and drawings, graphics such as charts and bar graphs, photographs, and design features like use of color and typography — to convey information. Posters may differ in terms of content, design, and organizational structure depending upon the discipline. Before creating your poster, look at examples from researchers in your area of study to ensure that you follow the appropriate conventions for your field. This article gives an overview of the genre of scientific posters, offers guidelines for creating effective scientific posters, and includes two example posters.

Display Venues for Scientific Posters

Scientific posters are usually displayed during professional conferences, formal events in which researchers in a particular discipline gather to share and discuss their work with each other as well as network and socialize. Posters are often shown in a prominent area such as an exhibition hall. ‘Poster sessions’ held during the conference allow poster creators to interact with their readers and engage in one-on-one and/or small group discussions about the poster’s content and answer questions. In addition to the more formal events routinely held during a conference, these sessions offer another venue for attendees to learn about the work of their peers, meet colleagues with similar interests, and forge new collaborations.

While many posters are created for professional conferences, researchers on college campuses might also create a poster to showcase a particular project. For instance, a biology professor may want to publicize the work she and her graduate students are conducting in her lab. In this case, the professor and her students might display the poster in the hallway outside of the lab or in another public forum in the department or on campus. Unlike at a professional conference, in this scenario the professor and her students will want to assume that many of their readers will not be as knowledgeable as readers attending a conference about the subject matter. Some readers may be the professor’s colleagues who specialize in another area, others

1 A type of document or form of communication. Research reports, resumes, webpages, oral presentations, even text messaging are all different communication genres.
may be faculty in other disciplines, and still others may be students. The professor and her students will want to carefully consider their audience in adapting their information so that readers who are not subject matter experts will understand the project and find it interesting.

Keep in mind that if you display your poster at a professional conference, you will have the opportunity to interact with many of your readers — but you will not be able to interact with all of them. Consequently, your poster needs to be able to ‘stand-alone.’ That is, the information in your poster must be immediately understandable to your intended readers without any additional information.

Organizing Your Poster

This section provides guidelines for organizing the main sections of a scientific poster. Much like research reports, scientific posters often follow what is known as the IMRaD format (http://writing.wisc.edu/Handbook/ScienceReport.html) (Introduction, Materials and Methods, Results, and Discussion) as explained below.

Title:

Describe the research project briefly and concisely using a short phrase that forecasts what the research study is about. In some disciplines, the title might highlight one or two major research findings of the study. The title should be no more than two lines.

Author Name(s) and Affiliation(s):

Include the name of each author on the line underneath the title. Include each author’s institutional or organizational affiliation on the next line. If more than one author has the same affiliation, you only need to list the institution or organization once. Use superscript numbers at the end of each author’s name to indicate the same affiliation.

Introduction:

Introduce the specific research question, explain why the question is important, conduct a very short literature review, and state the purpose of the study.

Note: Include your list of references in a separate section (see References). In some disciplines it is conventional to include in-text citations in the Introduction (and the Discussion), while in other disciplines only the list of references is included. It may also be conventional in some disciplines to include a separate section before or after the Introduction entitled ‘Study Objective’ or ‘Study Design,’ a one to two line phrase or sentence that states the overall purpose of the project. You might also use a bulleted list to include multiple study objectives.

The literature review is a fundamental component of most scientific research reports. The purpose is two-fold:

1. Explain how the current research project fits in with what is currently known in the field by summarizing and citing the most relevant research conducted to date, and
2. Outline the gap in scientific knowledge that the current project addresses.

In the literature review of a research report you should discuss the published, peer-reviewed studies that other researchers have already conducted related to your research question or topic. Then explain how your project addresses what is still not known about the research question or topic.

As you’ve probably guessed, posters have a very limited amount of space. Thus, you will not be able to include a full literature review. This means you will need to carefully select and discuss the most relevant sources to frame your project. Look at a few sample posters in your field to determine how the literature review is conducted as well as how many sources tend to be included.

Materials and Methods:

Explain the methodology used to conduct the research as well as the materials used. This section should explain:

1. What you did to conduct your research project, and
2. How you did this

For example, let’s say you interviewed 100 college students about their exercise habits. The previous statement explains what you did—you interviewed 100 college students about their exercise habits. But you also need to explain how you did this:

- What questions did you ask during the interview?
- How did you conduct the interviews? Did you use an online survey or did you talk to the students in person? (Were the interviews one-on-one, or did you conduct small focus groups?)
- How did you recruit the students to participate?
- Did you interview students from all years in school or just freshmen or just sophomores, for instance? How did you decide which groups of students to interview?

In a research report, you would need to be very specific about your materials and methodology. Researchers in your field want to know detailed information about your materials and methods to ensure that your research approach is sound. In a research report, you would need to provide enough detail that your readers could repeat the study. In your poster, however, you won’t have the space to provide this level of detail. Much like in the Introduction, you’ll need to decide what your audience most needs to know about your methods, and then streamline that information. Use visuals, if possible, to show key features of your methodology.

Note: In some disciplines this section may be referred to as ‘Methods’ or ‘Study Design.’

Results:

Report the results/major findings of your research project. Show the results using visuals—charts, graphs, maps, drawings, photographs. Use captions to briefly explain your visuals and to tell your readers what information is important in each of your visuals. The Results is usually
the longest section of a scientific poster.

**Discussion:**

Explain and interpret the results major findings. As the title of this section suggests, discuss how the findings support and/or refute similar and/or related studies in the field. Forecast the next steps for research in the field. What should future research on this topic focus on?

**Acknowledgements:**

Many science and engineering research projects receive grant funding. List any organizations that provided funding for the project and include the grant number. This section can also be used to acknowledge other project contributors and/or advisors. Students often use this section to acknowledge their faculty advisor.

**References:**

Include full citation information for all of your sources. Cite references in the citation style used in your field. APA (http://www.apastyle.org/learn/faqs/index.aspx), the citation style of the American Psychological Association is commonly used in the social sciences, and CSE (http://www.scientificstyleandformat.org/Home.html), the citation style of the Council of Science Editors, is commonly used in scientific disciplines. Check with your professor, advisor, or another professional working in your field to determine the correct style.

Sample Poster Template: https://www.youtube.com/watch?v=tqG2zojFhc

**Writing and Designing Your Poster**

As previously mentioned, space on a poster is limited—very limited. Thus you will need to make strategic decisions about what information (text and images) to include and how to organize this information in each section.

**Audience**

Posters should aim to show, not tell. Regardless of where your poster is displayed—the exhibit hall of a conference or in the hallway by your lab—your readers will look over your poster very quickly. In fact, they’ll probably just skim over it, looking for information that interests them. Review the guidelines in this section to make strong writing decisions that engage your audience, engender interest in your project, and guide your readers through your main points. Before creating your poster, carefully analyze your audience by considering the following questions:

- What do your readers already know about the topic or research question?
- (equally important) What do they not know?
- What information do they care about, and what details will you need to provide?

**Writing for Expert Readers**

As mentioned earlier, scientific posters are often created for expert readers—that is, colleagues and peers in your field. When communicating with other people in your discipline, you can generally assume that they will have a high level of knowledge and interest in the topic. You’ll be able to use technical terms specific to your field in your poster without defining these terms or explaining why they’re important. You also don’t need to provide as much “background” or contextual information about the topic as you would for non-expert readers because expert readers are probably already familiar with this information.

Expert readers have very different informational needs than non-expert readers. Researchers in your field will generally be most interested in the Results and Discussion sections of your poster. They’ll want to know what you found, how these findings contribute to what is already known and accepted in the field, and where future research in the field may be headed.

**Writing for Non-expert Readers**

On the other hand, when you’re creating a poster for readers who are non-experts in your field or the specific research question, you’ll need to consider 1) why people who are not in your field or familiar with the research question might find your project interesting and 2) what aspects of your project they might want to know about.

Generally speaking, non-experts are not interested in technical details. They don’t need to know as much about your methodology because unlike expert readers, they probably won’t be critiquing your research approach to ensure that your approach was scientifically valid. They care less about references and the specific details of studies that other researchers are conducting in your field. They also don’t care or need to know about specific details related to your findings. They do, however, and unlike expert readers, need more background and contextual information about the topic. They may not have much knowledge about the topic or why it’s important—the kind of stuff that expert readers would already know. Non-experts are generally more interested in scientific research projects from a ‘big picture’ perspective—that is, how the topic might affect them either personally or on a broader, societal level.

To illustrate, let’s use our previous example of the biology professor and her students. Before creating their poster, the professor and her students will need to carefully assess the reasons that faculty and students in other disciplines might find their work interesting, and what these readers might want to know about it. Let’s say the group is studying algae blooms, and let’s say certain types of algae blooms are increasing as global temperature levels rise. Expert readers, other researchers in the biology professor’s field, are interested in the specific details of her study—details about how the study was conducted, the particular strain of algae used, and how the strain reacted to precise temperature fluctuations in differing water conditions in different geographic region, for instance.

Non-expert readers probably don’t need to know the properties of the strain of algae investigated or the detailed measurements that were collected at the study sites or the range in temperature fluctuations that were observed. But, let’s say the geographic regions under study are nearby and increasing algae growth of this particular strain might adversely affect local water quality. Non-experts living in the area might want to know about this. Thus, the professor and her students might frame the information in their poster from this perspective. Another option

3 This is a fictional example and does not refer to an actual study in the field of biology.
might be to relate the project to the larger societal issue of global warming. Either way, the group will need to broaden their focus as well as make assumptions about what their non-expert readers might be interested in learning about in terms of how it affects them.

The professor and her students will also need to simplify the information they provide including any field-specific terminology. They'll need to decide if their readers need to know any technical terms or if they can just use everyday words and phrases. Let’s say the professor and her students are studying a strain of algae that is particularly invasive and is posing serious local water quality problems. In this case, the group may decide to use the technical term because the entire poster is about this algae strain and/or readers are likely to encounter more information about the strain in the future. At the same time, they may choose to not give details about other strains that they mention but which are not the main focus of the study.

In deciding whether to use technical terms and concepts when communicating with non-experts, determine if non-experts readers need to know the term or concept in order to achieve your purpose, as you may be able to simplify this information. If you provide too much technical detail, you run the risk of losing the attention of your non-expert audience. If you decide you must use the technical term, define it using everyday words and phrases. You might also provide an example that compares the term or concept to something with which the audience is already familiar.

A Few Additional Points about Audience...

Expert and non-expert readers differ primarily in terms of their level of knowledge about a particular topic. Someone who is an expert in one communicative context will not be an expert in a different communicative context. For example, the biology professor is an expert reader when reviewing information in her field of study—specifically, algae blooms and water quality. She is a non-expert reader when reviewing information in other areas of biology that she is less knowledgeable about as well as other scientific fields such as zoology or geology. She will need more background info about research projects in areas she is unfamiliar with and field-specific terms will need to be defined for her.

Non-expert readers are a very broad audience and can encompass a wide range of knowledge levels about the particular topic at hand. Some non-expert audiences will be more knowledgeable about others about a particular topic. Thus, you will always still need to assess your readers as a group and make assumptions about what they think they already know, what they don’t know, and what information they care about.

Purpose

In addition to carefully analyzing your audience, you’ll also need to determine what you want to achieve in creating your poster. What do you want your readers to know or think or believe about your research project after reading your poster? What information do you need to provide to ensure that you achieve your purpose?

Generally speaking, the purpose of scientific posters is to

- inform your readers about your research study,
- persuade your readers that your research question and findings are important and interest-

ing (you’ll also want to persuade expert readers that your study fits in with existing research in the field, addresses a gap in scientific knowledge, your methodology is sound, the results are valid and important to the field, and finally, that future research should take a specific direction).

Make strategic decisions based on your assessment of your audience and purpose about what text and images to include in your poster to achieve your purpose and meet the informational needs of your audience.

Layout and Poster Size

Posters often use a three or four-column format. Generally speaking, the Introduction and Materials and Methods section will comprise the first column, the Results will comprise the second column, and the Discussion, References and Acknowledgements will comprise the third column. Posters also commonly use a landscape or horizontal format. Common measurements for landscape layouts (width by height in inches) include:

- 40x32
- 44x32
- 44x36
- 48x36

You can also create your own dimensions depending upon the conventions in your field and/or the conference guidelines (if you are creating your poster for a professional conference).

Type

Typeface Selection

Choose a serif typeface such as Times New Roman, Cambria, or Georgia—or a sans serif typeface such as Arial or Calibri. Both serif and sans serif typefaces are easy to read and look professional.

Avoid decorative and script typefaces. There might be a situation where a decorative or a script typeface is appropriate and visually effective for your purpose (depending upon your audience, purpose, and display context), but generally speaking, professional scientific posters use serif and sans serif typefaces.

To create effective contrast between the title, headers, and body copy, you may want to use a serif typeface for the larger text on your poster—Title, Author Name(s) and Affiliation(s); and Headers—and a sans serif typeface for the smaller text—Body Copy and Captions—or vice versa. For instance, use Arial for your larger text and Times New Roman for your smaller text. Title, Author(s) and Affiliation, and Headers should use the same typeface and Body Copy and Captions should use the same typeface.

You can also use the same typeface for all of the text on your poster. In this case, use a larger

4 The terms font and typeface are often used interchangeably. Font refers to the typeface category and the size. For instance, Arial 10 point and Times New Roman 12 point are fonts. Typeface refers to the category of type. Arial and Times New Roman are typefaces.

5 ‘Body copy’ is any text that is not a title, header, or a caption.
Color
Carefully consider your color choices. Posters often use the color scheme of the first author’s affiliation. For example, the University Apiary example uses the school’s colors—blue and orange. However, you might also choose a color scheme that seems appropriate for your topic and/or subject matter. Generally speaking, aim for 2-3 colors at the most—you can also use lighter and darker shades of your colors.

Avoid white or light colored text and dark backgrounds—light text is hard to read. Instead, opt for dark text on a light background.

Avoid busy backgrounds. If you use a pattern or a photograph as your background image, make sure that your readers can still read your text (fill your text boxes with a color that complements your color scheme so that your text is still readable against the pattern). Ensure that your background does not visually compete for the reader’s attention with the other design elements (text and visuals) on your poster. Your readers should not really notice the background—if they do, they’re probably not looking at the other information on your poster. The Sample Poster Template (https://www.youtube.com/watch?v=tgG2zojlFhc) uses a background with a light green pattern. Readers can still read the text because the text boxes have been filled with a color that complements the background color.

Serif and Sans Serif: https://www.youtube.com/watch?v=QWCz_OIEZpU
Use ‘warm’ colors such as red, orange, and yellow sparingly and only to accent the other features of your design. Use ‘cool’ colors such as blue, green, and purple as your dominant or main color. (Be careful with purple, though. It, too, can be overwhelming). Warm colors jump out at readers while cool colors recede. This means that warm colors can quickly visually overwhelm your readers and create too much contrast. You need a lot less of a warm color to make an impact than a cool color. The Sample Poster Template uses a red/green color scheme. Red is used as the accent color, and green is used as the dominant color. The University Apiary uses a blue/orange color scheme. Here blue is the dominant color, and orange provides the accent.

White space

‘White space’ is the ‘blank’ area that separates your design elements (text and visuals). White space is crucial for strong document design because it allows readers to visually separate information into manageable chunks as well as understand the relationships between and among your content. Avoid crowding your poster with too much information—either text or visuals. If a poster is crammed full of information, it will be too difficult for readers to understand your main points. Good design is ‘clean’ design.

Selecting Images

Resolution essentially refers to the digital quality of an image—“how clean and clear [the image] looks,” as professional graphic designer Robin Williams explains it. Low resolution or ‘low res’ images appear pixelated or blurry when you increase the image size because there’s less digital information. Conversely, you can increase the size of higher resolution or ‘high res’ images without loss of quality because there’s more digital information.

Use images with at least 300 dpi (dots per inch) in your poster. If an image looks pixelated on your computer screen, it will only look worse on a large, printed version of your poster. Always check the resolution of your images.

Additionally, be sure to size images proportionally. Images that have been stretched or shortened to fill a particular space look sloppy and detract from the professionalism of your poster. Lock the aspect ratio when increasing or decreasing image size.

Add a border to your images and your text boxes so that they stand out against your background.

Finally, images are intellectual property. If you did not create an image, you most likely will need to get permission to use it. Many images are also protected by copyright. Always determine who owns the image, what permissions you will need, and how the image should be cited in your poster. The photographs included in the sample posters are ‘royalty free’ and were purchased for a small fee from photos.com. However, photos.com is still acknowledged as the copyright holder, and these photos may only be used for ‘non-commercial’ purposes. You might also explore the following sites:

- [http://search.creativecommons.org/](http://search.creativecommons.org/)
- [http://www.freedigitalphotos.net/](http://www.freedigitalphotos.net/)
- [http://www.publicdomainpictures.net/](http://www.publicdomainpictures.net/)

Software and Technical Issues

You’ll need to print your poster on a large format printer. You’ll probably want to save your file as a PDF, but check with your print shop in advance about sizing as well as appropriate file formats. If you’re using PowerPoint (see below), you may also want to talk to your print shop about color.

PowerPoint

Many posters are created using PowerPoint. This program is generally easy to use, but it is not a page layout program (like Adobe InDesign). Be sure to adjust the settings so you can modify the spacing of the elements in your design so that your final poster looks professional. Do not rely on the defaults.

PowerPoint is presentation software, meaning the slides are intended for digital display only—not print (and remember, you’ll be printing your poster). PowerPoint uses RGB (Red Green Blue) color mode, which is calibrated for computer monitors—again, not printed documents. So the colors you select in PowerPoint will not look the same in print as they do on your screen. You may be able to work with your print shop in choosing colors that most closely approximate the color scheme that you want.

Adobe Software

You can also use a page layout program such as Adobe InDesign, which allows you to work in CMYK (Cyan, Magenta, Yellow and Black), the color mode intended for print. You’ll have a more accurate representation of your color choices, and these programs will give you more control over the design of your poster. However, because there are more features, learning these programs can be time consuming.

Poster Examples

Two sample posters are included in this article with accompanying short instructional videos that explain many of the writing and design features of each. Both examples were created in PowerPoint. Click on the links to the videos included earlier in this article to learn more about each example.

Sample Poster Template

This annotated example illustrates the IMRaD format, an organizational structure commonly used when communicating with expert readers. The text boxes include the information from the “Organizing Your Poster” section of this article.
Before creating your poster, be sure to assess your intended audience (expert? non-expert? somewhere in between?), your purpose, and the context of display (professional conference? a particular building on your campus?) so that you can make effective and well-thought out writing and design decisions. Click on the links below for more information on creating scientific posters and for additional sample poster templates.

- **http://www.writing.engr.psu.edu/posters.html** (see this site for a few templates and other examples).
- **http://colinpurrington.com/tips/academic/posterdesign**
- **http://www.scientificpostersonline.com/posters/**
- **http://www.postersession.com/templates.php**

**Exercises**

1. Search the web (using one of the links above, if you wish) for an example of a scientific poster. Then, using the information found in this article, analyze the poster you have found. Does the poster have all of the necessary components? Is the poster missing any parts? Is there extraneous information included in the poster? Who is the audience for this poster?

2. Using the class project for which you will be creating your poster (your teacher will tell you which project to focus on), create a sketch of your poster. Which components will you need?
to include, and where will you place each section on the poster?

**References**

Chapter 7: Style in Professional and Technical Communication

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The You-Centered Business Style

By Angela Eward-Mangione, University of South Florida

Learning Objectives

- Compose professional/workplace documents and oral presentations for multiple audiences and specific purposes using appropriate technologies
- Apply/adapt professional writing conventions, including genre, tone, and style for particular writing situations

Considering the rhetorical aspects of any writing situation, such as purpose, stance, and audience, is an essential part of adapting the style of a message for any audience. Adopting a you-centered business style can help you achieve your purpose, choose a stance, and analyze your audience. A you-centered business style employs the you view and an audience-centered tone in order to choose particular words and adopt a targeted tone in a message.

The “you view” analyzes and then emphasizes the reader’s interests and perspective. Because the reader’s interest or benefit is stressed, the writer is more likely to help the reader understand information or act on a request. Adopting a you view often, but not always, involves using the words you or your rather than we, our, I, and mine. Consider the following sentence that focuses on the needs of the writer and the organization (we) rather than on those of the reader.

- We have not received your signed invoice, so we cannot process your payment.

Even though the sentence uses “your” twice, the first clause suggests that the point of view focuses on the writer’s need to receive the invoice in order to process the payment. The word “we” itself is not problematic, but the we view is. Consider the following revisions, written with the you view.

- We understand the importance of processing your payment and will do so as soon as we receive your signed invoice.
- So you can receive your payment promptly, please send your signed invoice.

The needs and benefits of the reader are stressed in both of these examples. The first example focuses on the needs of the audience by associating the payment with “importance.” The second revision emphasizes the benefits to the reader by including the second-person pronouns “you” early in the sentence.

Both revisions also use an audience-centered tone, so the writer is more likely to motivate the reader to act. An audience-centered tone foregrounds the reader’s needs, preferences, and benefits. Incorporating an audience-centered tone into your writing means that you consider the words you choose and the ways in which you assemble those words in a sentence.

Workplace Case Studies

Case Study 1: Delivering Negative News

Let’s consider a few examples based on specific workplace situations. Imagine that you are a Human Resources Manager who must inform employees that paychecks will be delivered a day late. Employees with direct deposit agreements will not be affected. A writer who does not analyze the rhetorical situation before carefully considering style might hastily write, “Due to an error made by our payroll company, all employees who never signed up for direct deposit will receive their paychecks late.”

The writer’s purpose in this writing situation is to tactfully deliver negative news. The writer’s stance should be professional and empathetic, especially since the writer’s audience will probably be disappointed, irritated, or frustrated by the message. Consider the following revision, written with the you view and an audience-centered tone.

- We apologize for the inconvenience caused by the fact that an issue at PLT processing will delay the next paycheck date by one day. By signing up for direct deposit, you can ensure that your pay will never be delayed.

The writer achieves their purpose by including a buffer with an audience-centered tone (“We apologize for the inconvenience”) before the bad news (“an issue at PLT processing will delay the next paycheck date by one day”). The writer also includes the reason for the negative news (“an issue at the payroll company, PLT processing”). The writer uses the second-person possessive pronoun “your” in the second sentence to promote the you view. The writer also maintains a problem-solving and empathetic, audience-centered tone by waiting until the second sentence to remind the audience that they can sign up for direct deposit.

Case Study 2: Promoting Safety in User Manuals

Another writing context might require a writer to compose a user manual for a ceiling fan. User manuals provide instructions for the setup, operation, and maintenance of a product. Most user manuals also include safety precautions and troubleshooting guides and charts. A writer who does not analyze the rhetorical situation before writing a section about mounting a ceiling fan might write a sentence like, “Be sure to read the following important information about where Super Air Flow fans might best be installed before mounting the fan.”

However, the writer’s purpose is to inform the reader about how and where to safely mount their fan. Consider the following revision, written from the you view and with an audience-centered tone.

- Before mounting your new Super Air Flow fan, read the following helpful recommendations.

This revision incorporates the you view by referring to the user as the owner of the fan (many user manuals are called owner manuals). The revision also adopts a you-centered tone by subordinating the dependent clause that refers to the fan to the independent clause that offers the
reader “helpful recommendations.” These revisions will help the writer achieve her purpose—promoting safety.

**Principles and Guidelines for Practice**

1. Consider your purpose from the you view.
2. Analyze the audience and their potential reactions.
3. Adapt your message to the receiver’s needs by putting yourself in that person’s shoes (adopt the you view) and emphasizing the reader’s benefits (adopt a you-centered tone).

Note: Although emphasizing second-person pronouns (you/your) instead of first-person pronouns (I/we, us, our) can help you cultivate a you-centered business style, a you-centered style should include both a you view and an audience-centered tone that emphasize the reader’s needs and interests.

<table>
<thead>
<tr>
<th>I/we View</th>
<th>You View and Audience-Centered Tone</th>
</tr>
</thead>
<tbody>
<tr>
<td>We are requiring all employees to respond to the attached survey about parking.</td>
<td>Please share your valuable thoughts about parking on the attached survey; your opinions matter. Because your ideas count, give us your thoughts on the attached survey about parking.</td>
</tr>
<tr>
<td>I need to know what type of model you have before I can do anything.</td>
<td>Would it be possible for you to tell me what type of model you have so that I can help you solve this problem? I can help you solve this problem. Would it be possible for you to tell me what type of model you own?</td>
</tr>
<tr>
<td>All employees must immediately fill out the enclosed questionnaire so that we can allocate our continuing education funds to employees.</td>
<td>You can be one of the first employees to sign up for our continuing education funds by immediately filling out the enclosed questionnaire. By immediately filling out the enclosed questionnaire, you can be one of the first employees to receive continuing education funds.</td>
</tr>
</tbody>
</table>

**Exercises**

You can strengthen your skills in using the **you-centered business style** by revising each of the below sentences so that they incorporate both the you view and an audience-centered tone.

1. All new employees must completely fill out the attached personnel profile form before they can receive their first check.
2. We can only process complete travel reimbursement requests.
3. We consider your safety and the safety of others important.
4. We encourage you to permit air to flow between the two sections of any Super-Fridge refrigerator in order to ensure proper temperatures.
5. All of our customers should read the user manuals we write so that our products will be installed safely.
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? (For some background information on tone, click here: http://writingcommons.org/open-text/writing-processes/think-rhetorically/716-consider-your-voice-tone-and-persona)

“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.

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—It’s Often More Effective (and having it in writing might be valuable down the line)

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 do 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!

Your emails should make people feel like this:
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.

Exercises
Considering the tactics above, write one-paragraph emails in response to the following scenarios.

1. Your colleague Tina promised to send you a spreadsheet full of data that is central to a report you’re writing. She said she’d have it to you by Thursday, and today is Friday. Your own report is due Monday. Write Tina a brief email about this situation.

2. You are interested in taking a week-long training class that you believe will help you perform your job more effectively. There is a small training budget within your company, but the only class being offered is on the other side of the country and would require flight and hotel costs in addition to the substantial tuition. Make the case for the money to your boss in an email.

3. You were the hiring manager for a new position that opened up at your organization. After sifting through nearly fifty resumes, you chose to interview one outside candidate and one internal candidate named Joe. Both had similar experience and educational backgrounds, but you ultimately made a job offer to the external candidate due to the fact that she seemed to have more creative ideas about how the department could handle current issues, whereas Joe seemed to have little to offer. Email Joe explaining that he did not get the job, and offer him constructive criticism.
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?
✓ 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?
Chapter 8: Research Methodologies in Professional and Technical Communication

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Web Search Strategies ................................................................. 226
How to Read a URL ........................................................................ 230
Smart Searching ............................................................................ 235
As you learned in Chapter 1, it is important to consider your audience when writing a technical communication document. Categories like race, class, and gender, also known as demographic, can contribute to the way a person perceives a particular issue or document. However, keep in mind that, while demographic categories are helpful in determining your target audience, people should always be treated as individuals. Avoid stereotyping by considering that there are always exceptions to the general rule.

So, how does one determine an audience's demographics, and, therefore, an audience's needs? There are several common research methods for distinguishing your target audience:

Library and Internet Research:
You can do some preliminary research before interacting with your target audience. The library and internet can provide many resources for gathering information from studies that have already been conducted, including census reports and other public records, scholarly and trade journals, and official websites for professional organizations and government departments. You can find an annotated list of useful library and internet resources in the appendix of this book.

Because library and internet research yield so many resources, you should learn to check the credibility of your sources. First, determine the place or organization that published the source. Is it a prestigious press, university, or professional association? This will get easier as you become more familiar with the top publications in your field, but until you do, a helpful tip is to analyze the document's design. Generally, but not always, credible sources are presented cleanly and concisely. Also, check the source's citations. A credible source will usually cite other credible sources. If you are researching data, consider the methods used to collect the data. Does the report describe the process? Is the data current? Remember that in the fields of health, science, and business, new discoveries occur often and replace old data. Recent publications are, therefore, often more credible than older ones. We have provided an annotated list of some useful resources specific to professional and technical communication in the appendix of this book.

Field Research:
Field research relies on direct observation and interaction. This includes surveys, interviews, and focus groups, as well as observing your intended audience or subject in context. For example, if you are hired by a hospital to help improve patient communication, you might observe, with permission, some interactions between patients and nurses or doctors. When conducting field research, you should triangulate your data. This means that you should collect your data from multiple sources and observers to ensure accuracy. A single observation of a single subject may not accurately represent the norm or group.

Survey:
Surveys are particularly useful in providing statistics about demographics and answering specific questions directed towards your audience. You can ask straightforward questions about race, gender, beliefs, attitudes, etc. For example, you might ask respondents to select their racial identity from a list of choices. You may need to ask deeper questions, such as what kind of medications respondents are currently taking. When asking more complex questions, carefully consider the response options and what is implied in the language you use. Keep in mind that the respondents are limited to the options you provide. Also, as with all documents, make sure the survey questions avoid offensive language and are culturally sensitive.

Surveys save time because, although you have to prepare them, people can usually fill them out independently. However, you may want to reserve time for follow-up conversations, especially because survey respondents have limited answer choices. If you choose to do this, make sure you provide your contact information in the survey or solicit respondents' contact information (along with permission to contact them). Independently completed surveys often have a low return rate, so consider how widely you want to spread the survey. Finally, because surveys often reach a large number of people, it may be difficult to determine whether the results truly reflect the views of your target audience.

For more information on surveys, see The Community Tool Box at the University of Kansas: http://ctb.ku.edu/en/table-of-contents/assessment/assessing-community-needs-and-resources/conduct-surveys/main

Interview:
Interviews are a more qualitative research approach because answers are more personal and open-ended. While they can yield more information than the simple "yes/no" questions of a survey, answers represent the particular perspective of the interviewee. You also have a much smaller sample because of the amount of time it takes to conduct interviews. Prepare your questions ahead of time; you should prepare more than you are likely to need and avoid the "yes/no" questions usually reserved for surveys.

Focus Groups:
Focus groups are interviews conducted with a small group of people at the same time. You should 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, but a moderator should keep them on task. The moderator should also mitigate any hostility between personalities and conclude the session within 1-2 hours. You should conduct a few focus groups for any given project to ensure reliable sampling.
Each of these methods has its merits and challenges, and the method you choose to use should depend on the context of your project. For example, focus groups and interviews may be a better choice when you have already narrowed down your target audience. Often, the process of producing a document for a specific audience will require a combination of these methods. You might begin with library or internet research to learn about an area’s demographics, and then conduct interviews with people who actually use the product for which you are composing technical documentation.

Exercises
Choose the best audience research method (this may be one or a combination) for each scenario and explain your decision:

A (health sciences)
1. You are creating a pamphlet describing the benefits and side effects of a pill that helps lower cholesterol. Your employer is the pharmaceutical company that produces the pill. They have supplied the data, but you need to present it clearly to users and potential users of the medication.
2. You are designing a computer patient information system for a hospital and want to know how to make it most efficient for doctors, nurses, and staff.
3. You want to research the demographics of an area surrounding a new medical center to determine what services would be most useful.

B (engineering)
1. You have developed a new user manual for a printer, and you want to find out if it is helpful to users of the product.
2. You need to research a city’s traffic patterns to decide exactly where to install signs and directions towards a newly constructed bridge.
3. You have developed a tutorial for a new computer software program, and want to determine its usefulness to users.

C (professional/business writing)
1. You are creating a handout for a meeting that you will run with a colleague, and you want to make sure you list all major talking points for the both of you.
2. You are producing a report on your company’s financial standing for potential investors.
3. You are giving a presentation on your company’s latest product to an audience of potential buyers. You want to research their needs in addition to providing proof of the product’s success with other groups.

References
Usability and User Experience Research

By Guiseppe Getto, East Carolina University

Learning Objectives

• Compose professional/workplace documents and oral presentations for multiple audiences and specific purposes using appropriate technologies
• Design documents, visuals, and data displays that are rhetorically effective, accessible and usable for specific audiences

Usability is the art of making sure that any kind of communication deliverable (e.g. a website, a handbook, a user guide, etc.) is intuitive, easy-to-use, and helps users achieve their goals. Usability is part of the broader discipline known as User Experience Design (or UX), which encompasses all aspects of the look, feel, and information contained in a communication deliverable. Usability testing, the process by which a communication deliverable is assessed, however, remains at the core of this discipline.

Traditionally, usability has been a practice utilized by software designers and engineers to test complex technologies before they go to market. In order to perform usability testing, test users that fit the basic demographics of target consumers (e.g. age, region, occupation, languages spoken, disability status, etc.) are recruited. These test users are organized into “user segments” or demographic groups that fit particular criteria (e.g. young adult, Midwestern college students who speak English as a second language). Test users are then run through a battery of tests to ensure that the technology being developed is functional.

With the publication of Jakob Nielsen’s Usability Engineering (http://www.nngroup.com/books/usability-engineering/) in 1993 however, this process began to evolve. Test users are now recruited earlier in the design process and thus have more of an impact on the shape the technology in development takes. In addition, Nielsen has developed five factors for judging whether a given communication deliverable is usable or not:

• Learnability: How easy is it for users to accomplish basic tasks the first time they encounter the design?
• Efficiency: Once users have learned the design, how quickly can they perform tasks?
• Memorability: When users return to the design after a period of not using it, how easily can they reestablish proficiency?
• Errors: How many errors do users make, how severe are these errors, and how easily can they recover from the errors?
• Satisfaction: How pleasant is it to use the design?

Source: http://www.nngroup.com/articles/usability-101-introduction-to-usability/

Since the World Wide Web has become a primary means of communication and commerce, the website has become one of the primary communication deliverables that usability researchers are concerned with. With the dramatic increase in information available to users of the Web, new methods have also been created for assessing the value of this information.

Michael Albers, a leader in the area of information design, has developed the following heuristic...
for what he calls “multidimensional audience analysis,” or the process of assessing how people make use of information (Albers, M. J., 2003).

Multidimensional Audience Analysis for Dynamic Information:

- Knowledge dimension: What subject matter expertise do users need to understand the information being presented?
- Detail dimension: How much specific detail does the user want regarding the information they are seeking?
- Cognitive ability: What is the reading ability and education level of the user. Do they have any physical or mental limitations that may affect their ability to understand the information?
- Social or cultural aspects: What is the social or cultural background of the user, and how does that impact their use of the information?

As Rex Hartson and Pardha Pyla explain in The UX Book: Process and Guidelines for Ensuring a Quality User Experience, the broader discipline of UX also includes such aspects of communication as:

- visual design of webpages and other types of interfaces
- information architecture or ways information is organized and displayed
- content strategy or plans for the development and distribution of effective content within webpages and social media
- user research or in-depth field studies into the culture of workplaces and other places users dwell
- usability testing or rigorous testing with test users similar to what Nielsen developed
- accessibility or ensuring that technology is usable by persons with disabilities

(For an infographic on UX, see “Essentials of User Experience” at http://www.homestead.com/blog/06/2013/ux-101-what-user-experience-infographic#	VL_3Mav3F-Go)

At its core, however, UX is still primarily concerned with ensuring that users have a satisfying, error-free experience with technology. Within the field of technical communication, movements like Plain Language (http://notebook.stc.org/at-the-intersection-of-plain-language-and-technical-communication/) have also sought to improve all forms of written communication so that documentation is universally understandable by any audience. Similarly, the adoption of Section 508 regulations (http://www.section508.gov/) requires that federal- and state-maintained websites are accessible to persons with disabilities.

UX is also driven by the world of business. Nearly every major corporation employs teams of UX professionals in the design and deployment of their website. Mobile applications designed by companies are rigorously tested to ensure that they are competing to target consumers. Emerging technologies like wearable body sensors are created and tested in corporate labs the world over. In truth, the non-profit, governmental, and education spheres have lagged behind in the usage and deployment of UX professionals. Regardless, it is estimated that even in the for-profit world, as much as 97% of websites fail at basic usability (http://blogs.forrester.com/adele_sage/12-03-15-lessons_learned_from_1500_website_user_experience_reviews).

Concerning the most common usability problems with websites, Jakob Nielsen has identified ten:

1. Using fonts that are too small or are difficult to read
2. Creating links that don’t clearly signal to users that they are links
3. Using Flash
4. Creating content that is too lengthy and wordy
5. Using search engines that don’t work properly
6. Creating websites that don’t work properly with the most common Internet browsers (e.g. Internet Explorer, Chrome, Firefox, and Safari).
7. Using web forms that don’t work properly (e.g. asking users to create password, but not clearly explaining what kinds of characters are required)
8. Not including contact information for the organization who created and/or maintains the site
9. Not including images that are large enough for users to see clearly
10. Using accessibility or ensuring that technology is usable by persons with disabilities

(For an infographic on UX, see “Essentials of User Experience” at http://www.homestead.com/blog/06/2013/ux-101-what-user-experience-infographic#VL_3Mav3F-Go)

As far as activities that UX professionals perform on a daily basis, usability testing remains a primary one. Any form of communication deliverable can be usability tested using steps like the following:

1. Define goals or tasks that users should be able to complete with the communication deliverable. Examples might include finding a certain piece of information, signing up for a newsletter, learning how to use your new smartphone, or setting up an account. A sound usability test asks users to complete about 7-10 major tasks. You should also include users in this step by conducting some preliminary interviews to uncover what goals users have for the type of deliverable you’re testing (e.g. a college website, a flyer for a student organization, the information contained in a piece of technology such as a smartphone or tablet, etc.).
2. Write each of your tasks down as imperative sentences that you will read to users. Examples might include “sign up for the organization’s newsletter,” or “learn how to sign up for a class.” Each sentence should be simple enough to be easily understood by users, but should represent a task that is a key goal of the communication deliverable.
3. Recruit people who fit the primary demographics of the target audiences for the communication deliverable. You should try to recruit at least 5 total users, and if you have a lot of different user segments (e.g. different ages, regions, occupations, languages spoken, or disability status), you should make sure you recruit at least one person from each segment.
4. Meet with each user and two researchers to run your usability tests. One researcher should lead the user through the task and should ask the user why they completed each task in the way that they did, or what they thought about while they were completing the task (you can ask participants to do this while they’re completing each task, after they complete each task, or at the end of the test. There are pros and cons to each approach: http://www.usability.gov/how-to-and-tools/methods/running-usability-tests.html). The other researcher should take detailed notes on what users struggled with, what they enjoyed, and overall impressions of the test. There are also various technologies available to help you record usability tests: http://www.usefulusability.com/24-usability-testing-tools/.
5. Analyze your results. Try to identify patterns in user responses to your communication de-
liverable. Also pay attention to differences between individual users and try to identify the source of these differences. Many times, differences in the ways users respond are key to understanding the needs of specific user segments.

6. Use your results to improve the user experience of your communication deliverable by improving aspects of it that users struggled with and emphasizing aspects they enjoyed. Future testing is recommended as well. UX is an ongoing process. Like all forms of writing and communication, it’s never really finished.

In conclusion, UX is really a complex series of research methods that, individually, require years to learn. That being said, all communicators should know a little bit about UX to ensure that they are communicating in ways that are usable to their target audiences. The following resources offer a large amount of free information on how to create usable, accessible communication deliverables.

UX Resources

Usability.gov [http://www.usability.gov/] - “User experience (UX) focuses on having a deep understanding of users, what they need, what they value, their abilities, and also their limitations. It also takes into account the business goals and objectives of the group managing the project. UX best practices promote improving the quality of the user’s interaction with and perceptions of your product and any related services.”

Boxes and Arrows [http://boxesandarrows.com/] - “Boxes and Arrows is devoted to the practice, innovation, and discussion of design, including graphic design, interaction design, information architecture and the design of business. Since 2001 [http://boxesandarrows.com/welcome-to-boxes-and-arrows/], it’s been a peer-written journal promoting contributors who want to provoke thinking, push limits, and teach a few things along the way.”

NN Group [http://www.nngroup.com/] - “NN/g conducts groundbreaking research, evaluates user interfaces, and reports real findings – not what’s popular or expected. With our approach, NN/g will help you create better experiences for real people and improve the bottom line for your business.”

PlainLanguage.gov [http://www.plainlanguage.gov/] - “The Plain Language Action and Information Network (PLAIN) is a community of federal employees dedicated to the idea that citizens deserve clear communications from government. We first developed this document in the mid-90s. We continue to revise it every few years to provide updated advice on clear communication.”

Section508.gov [http://www.section508.gov/] - “Section 508 requires that Federal agencies’ electronic and information technology is accessible to people with disabilities. It Accessibility & Workforce Division, in the U.S. General Services Administration’s Office of Governmentwide Policy, has been charged with the task of educating Federal employees and building the infrastructure necessary to support Section 508 implementation. Using this web site, Federal employees and the public can access resources for understanding and implementing the requirements of Section 508.”

Exercises

1. Visit a website that you use frequently, and evaluate the site according to the ten most common website usability problems (Neilsen), as identified above. Does the website have any usability issues that appear on the list? If so, how might those concerns be addressed?

2. Design a mock usability test for a social media site that you have some familiarity with. Include the 7-10 tasks that you would ask users to perform to ensure the site’s usability. Additionally, be sure to identify your intended audience—who will you ask to perform this usability test?

References


Usability Testing
By L.E. Cagle, University of South Florida

Learning Objectives
- Design documents, visuals, and data displays that are rhetorically effective, accessible and usable for specific audiences
- Develop information literacy strategies

Overview
Imagine that you have decided to check out a new local restaurant for dinner tonight. You don’t know their hours, though, so you navigate over to their webpage to investigate. As soon as the webpage opens, a huge image of food fills the screen. It’s a slideshow, so the images scroll past as you look around the page in vain for a simple listing of the hours. You have to scroll down a ways before you finally spot a link that says “About Us.” But when you click on it, it just takes you to a page with a brief essay about the owners and their food philosophy. Finally, you spot a link called “Contact” to the right and try it in desperation. There, under the address and the phone number, you finally spot the hours listed. By now, though, you’re frustrated enough that you’re not sure if you even want to dine here anymore.

What do you call this problem with the website? It’s not that the information wasn’t available, so it’s not an information-deficit problem. And it’s not that the website didn’t work, so it’s not a technical or functionality problem. Rather, it’s a usability problem. It’s a design and organizational problem that made it difficult for you, the user, to accomplish your goals using this object, the website. Moreover, the problem made you frustrated, creating a negative emotional experience, even though you thought you were ultimately able to accomplish your goal.

Usability is an extremely useful term that focuses our attention on users, rather than the things that they’re using. But what is usability? Design and user-experience expert Eric Reiss writes that usability “deals with an individual’s ability to accomplish specific tasks or achieve broader goals while ‘using’ whatever it is you are investigating, improving, or designing—including services that don’t even involve a ‘thing’ like a doorknob or web page” (2012, p. xvii). This is a broad definition, in part because it is applicable across a limitless range of users, things, and experiences.

Usability is a key concept in a number of fields, from industrial design to architecture to web development to technical communication. What these fields have in common is the study of the intersections of people, technologies, and designed artifacts and experiences. Approaching things through the lens of usability allows you to consider these intersections from the point of view of the user, which—in technical communication—often is synonymous with the point of view of the audience.

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 foremost concerns throughout the design process, from conception to public release of a thing. In practice, of course, this can be a difficult target to hit. Some workplaces may enthusiastically embrace user-centered design, which is a design process that literally brings real live users into the development phase. The idea is that bringing in users during the design phase ensures that the design will be a “natural” fit rather than something users have to learn or work around in some way. For example, an airplane designer could ask potential passengers to describe the typical motions and activities they engage in on planes. Seats, tray tables, and the like could then be designed around these motions and activities, with ongoing input from the sample passengers.

However, user-centered design is often costly and time-consuming, so many workplaces will only incorporate real live users in the testing phase, if at all. Especially if users are not directly involved in either the development or testing of a product or service, the task of advocating for users often falls to the designers and technical communicators involved with the project. It is then up to you to determine who the users are, what their needs and expectations are, and how those needs and expectations can best be met.

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

For example, usability studies could focus on any one or more of the following elements of a designed object or system (and this list isn’t exhaustive!):

- Clarity
- Consistency
- Convenience
- Elegance
- Familiarity
- Functionality
- Learnability
- Predictability
- Responsivity
- scan-ability
- simplicity
- visibility

If you are able to involve users in development and testing, there are a number of established research methods for eliciting their participation and feedback. There are a number of training resources for using such methods, which include focus groups, tree testing, user observation, and user diaries, among others.

Heuristic for Practice
The following questions comprise a heuristic you can use to assess whether you have thoroughly incorporated usability principles as you design or write for specific audiences. Your
particular context, such as your workplace or your timeline, may prevent you from addressing every one of these questions. Nonetheless, you should consider each one carefully in order to create products and services that are best suited for their particular users.

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

Exercises
This exercise places you in the role of user, giving you a chance to see how the heuristic questions guiding usable design can make or break a user’s experience with a designed object like a website. Read the following scenario, then complete the following instructions:

Scenario
Pick a town or city that you might want to move to one day. Imagine that you’re moving there in a month or two, and you need to find a place to rent. You’ll use a rental-listing website to find a place.

Instructions
Based on this scenario, complete the following:

1. First, try to answer all the heuristic questions about usability without actually visiting a website. Think about what kinds of goals you have and what sorts of data and organization you’ll need to achieve those goals.
2. Second, visit an actual rental-listing website like zillow.com, apartments.com, or Craigslist. Try using the website to find a place to rent.
3. Third, as you work your way through the website, revisit your answers to the heuristic questions and flesh them out with your newly gained experience. You may discover features of the website that work well for you and that you’ll add to your descriptions of top criteria. Or perhaps you’ll get frustrated by something about the website that make you realize some need you didn’t even know you had.

This exercise guides you through the process of using the heuristic to design an ideal thing for a specific user: you. You don’t have to produce a critique of the website itself (though you may want to by the time you’re done!).

References
Understanding Library Resources: Evaluating Systems and Sources

Amy Coughenour, Concordia University

Learning Objectives

- Develop information literacy strategies

Conducting research for papers, reports, and other assignments involves more than just typing a word or phrase into a search box. Understanding both the systems and the sources sets a foundation for retrieving relevant research. Before you jump into a search, take the time to think about where you should start and what types of sources you seek.

Evaluating Search Systems

*Search systems* contain the information, data, and search interfaces used to locate sources. Some examples of search systems include search engines, databases, wikis, institutional repositories, and other information collections. Search interfaces are the entry points for databases, search engines, and other systems. They can be simple (such as most databases' basic searches or Google's standard search), or more detailed (such as most databases' advanced searches or Google's advanced search). Think about which search systems will give you the best sources. For example, some search interfaces provide more detailed searching methods than others. Some systems contain sources across a broad spectrum of subjects, while others contain subject-specific sources. Before you choose a database or other system, ask yourself these questions:

- Am I researching an interdisciplinary topic? Does my topic fall under one specific subject?
- Am I researching a controversial issue? Do I need historical information? Do I need international information? Does my assignment focus on pro/con comparisons that require subjective points of view?
- Has my professor required specific types of sources, such as books, scholarly journals, or newspapers?

Once you’ve determined the answers to those questions, review the systems available in your library.

- Locate systems based on the subjects they contain.
- Look for descriptions that include coverage of historical sources, international research, controversial issues, etc.
- Confirm which types of sources are included in the systems. Check the “Advanced Search”
pages to find options that allow you to limit your search to scholarly journals, newspapers, etc.

Choose a database or other system (or two or three) and perform some searches. When you locate a source that fits your topic, review the subject terms and abstract. Adjust your search terms to incorporate this information. Remember to take advantage of limiters, such as source type (scholarly, full-text, etc.), publication date range, geographic location, language, etc.

Evaluating Sources

Evaluate the sources themselves to determine their usefulness for your research. A source’s abstract will usually give you everything you need to evaluate the source. (It’s also much less time-consuming to check a one-paragraph abstract than to read an entire article before finding out that it doesn’t fit your research needs.)

Decide whether you need popular or scholarly sources. Popular articles generally haven’t been as fully researched and reviewed as scholarly articles. Verify whether a source is popular or scholarly by considering:

<table>
<thead>
<tr>
<th>Type</th>
<th>Popular</th>
<th>Scholarly</th>
</tr>
</thead>
<tbody>
<tr>
<td>Purpose</td>
<td>current events, entertainment, summaries</td>
<td>research</td>
</tr>
<tr>
<td>Audience</td>
<td>general readers</td>
<td>scholars, researchers, students</td>
</tr>
<tr>
<td>Author</td>
<td>not experts, often unnamed</td>
<td>experts, researchers, always named</td>
</tr>
<tr>
<td>Characteristics</td>
<td>shorter in length, informal language, few citations</td>
<td>longer in length, formal language, more citations, peer-reviewed*</td>
</tr>
</tbody>
</table>

* Peer-reviewed articles have been reviewed and accepted for publication by a selected panel of recognized experts in the field of study covered by the journal.

Beyond a source’s popular or scholarly nature, consider the importance of these characteristics: authority, currency, objectivity, coverage, accuracy, and relevance.

- **Authority**—Authority focuses on the author’s background in the topic. Determine if the author is an expert or has conducted sufficient research.
- **Currency**—Check to see if the information provided in the source is current. For some research, older information is okay. Sometimes we even want to find historical documents. Other times, it’s best to have current research. Think about how the age of the information affects the research and conclusions.
- **Objectivity**—As you read the article, establish the author’s objectivity about the topic. Are you finding that the author has a particular point of view, or is he or she objective? For argumentative papers and controversial issues, subjective research can be useful to develop arguments and supportive evidence. However, other research requires objectivity. Keep in mind how these views could affect your own research.

- **Coverage**—Review the source to see if it covers the entirety of your topic. If it only covers a portion of the topic, is that enough for your research needs? If not, discard the source. If the source covers a broader range than your topic, does it provide enough information for your needs? If it only summarizes your specific topic, it may not be the right source for you.
- **Accuracy**—Your sources should also be accurate. One way to determine accuracy is to check a source’s reference list to see if it has a good number of sources. (Ten or more is usually good.) Another way to determine accuracy is to verify the source’s information from other sources.
- **Relevance**—Finally, confirm that the source is relevant to your topic. Sometimes when we perform research, we locate interesting sources only to find that they’re tangential to our topic. Be careful not to veer off-track.

**Exercises**

1. Using the questions for evaluating search systems that are included in this article, develop a research plan that will help you find sources for your next class project. Your research plan should identify the number of sources you need, the types of sources you need, a list of search terms, and where you will find these sources (i.e. specific databases, search engines, wikis, etc.).
2. Using the research plan you developed in question one, set out to find a source for your project. Once you have identified a source that you think will be useful, write a short paragraph evaluating the source’s authority, currency, objectivity, coverage, accuracy, and relevance.
Web Search Strategies
By Christine Photinos, National University

Learning Objectives

- Develop information literacy strategies

"[T]he fear that keeps us awake at night is not that all this information will cause us to have a mental breakdown but that we are not getting enough of the information we need." — David Weinberger, senior researcher at Harvard’s Berkman Center for the Internet and Society (from Too Big to Know [Basic Books, 2012])

Below are some strategies to help you more directly access the information you are seeking on the open Web. Consider them a beginning toolkit to draw upon for your web research. The web is always changing, and so is search. Be attentive to new tools as they become available.

Search with Phrases
You can narrow your web searches by enclosing phrases in quotation marks.

For example: Try doing a search for students on Mars, without quotation marks, and note the number and type of results you receive. Now run the search again, this time enclosing the phrase in quotation marks: "students on Mars." The number of results drops dramatically, and all of the results include the exact phrase "students on Mars."

Note: Capitalization is ignored in all major search engines. Searching for Mars is the same as searching for mars.

Add Terms to Narrow Your Search
Every time you add a term to your search, you are narrowing that search. So when you need to limit a web search, try adding more terms.

A good approach when adding terms is to identify each of the main concepts in the topic you are researching and then generate a list of terms associated with those concepts.

For example, suppose you are researching the following question: Should internet access at public libraries be filtered?

The question has three major components, each of which might suggest possible search terms.

<table>
<thead>
<tr>
<th>internet</th>
<th>Libraries</th>
<th>filtering</th>
</tr>
</thead>
<tbody>
<tr>
<td>computers</td>
<td>public library</td>
<td>censor</td>
</tr>
<tr>
<td>web</td>
<td></td>
<td>restrict</td>
</tr>
</tbody>
</table>

You’ll discover additional relevant terms once you begin searching, so it’s fine to begin with a small set of search terms.

Note, too, that search engines will often return related results. For example, if you begin your search with the terms web, library, and censor, Google will add the terms internet, libraries, and censorship to your search.

Filter Out Unwanted Terms
If your search produces many unwanted results, try to identify a term common to these unwanted results, and add it to your search with a minus sign (-) in front of it. For example, if you wanted to find a recipe for a salsa without tomatoes, you might use the following search:

salsa recipe — tomato — tomatoes.

This search will exclude from your results any page containing the term "tomato" or "tomatoes."

Open Pages in New Tabs
When you want to check out a promising result without losing track of your original set of search results, hold down your Control key (Command key on a Mac) and then click on the link. This will open the page in new tab.

View Cached Pages
Remember that search engines do not search in real time: they do not zip around the globe searching for answers to every search query. Instead, they search an index that has been compiled over time in order to determine which “live” web page to direct you to. The index includes the terms that appeared on the page in the past, when the page was last visited by the search engine.

Some sites are indexed more frequently than others. This is why our search results are sometimes disappointing: the information we seek was on the page days, weeks, or months ago when the page was indexed, but the information is no longer appearing on the live page. The search-engine index is out of date.

If a page is returned to you without your search terms, try navigating to the “cached” version of the page, as the information you are seeking may appear on this older/saved version of the page:

Find Recent Information on a Topic
If you want very recent information on a topic, you could use advanced search options (see...
“Explore More Search Options” below) to filter for only recent results, but you’ll probably retrieve better results by filtering for “News” specifically.

For example, web search results for the term privacy will emphasize general information and definitions, while a news search for this term will return reports of recent happenings around the issue of privacy, such as information about recent legislation and court rulings.

Most major search engines provide the option of searching news sources specifically:

![Search engines examples](image)

**Filter by Domain Name**

Distinctions among top-level domain names such as .org and .com have broken down in recent years, but some domain names have retained their original meanings and are helpful to know:

<table>
<thead>
<tr>
<th>domain</th>
<th>description</th>
<th>example</th>
</tr>
</thead>
<tbody>
<tr>
<td>.edu</td>
<td>university site</td>
<td><a href="http://www.nu.edu">http://www.nu.edu</a></td>
</tr>
<tr>
<td>.gov</td>
<td>government site</td>
<td><a href="http://www.senate.gov">http://www.senate.gov</a></td>
</tr>
<tr>
<td>.mil</td>
<td>military site</td>
<td><a href="http://www.army.mil">http://www.army.mil</a></td>
</tr>
</tbody>
</table>

(The top-level domain .org was originally intended for use by non-profit organizations—and many non-profits continue to use it—but it is now open to anyone.)

You can limit/filter your searches by domain with site:

- site:edu
- site:gov
- site:mil

(Note: there is no space after the colon)

Example: If you search for essay help, your results will be dominated by sites that sell essays to students (popularly known as “paper mills” or “cheat sites”). A search for essay help site:edu will primarily return college websites offering writing assistance.

The site: limiter also works with specific websites.

Examples:

- Privacy site:nytimes.com
  (This search will return New York Times articles containing the term “privacy”)
- Writing Center site:nu.edu
  (The first result for this search will likely be the web page for the NU Writing Center.)

**Explore More Search Tools**

Most search engines offer “advanced” search options.

Or, if you are signed in to Google, try clicking on the cogwheel in the top-right hand corner:

![Advanced search options](image)

Search engines routinely change the location of “Advanced search.” The important thing is to know that advanced search tools exist and to sniff around for them when the search engine interface makes them hard to find.

**Exercises**

1. Develop a list of search terms for your next class project. Enter your search terms into the search engine of your choice. What types of results are you finding? Is the information being returned to you relevant? Can you identify any unwanted terms that you can filter out of your search?

2. Using the same general topic that you developed search terms for in question 1, experiment with your preferred search engine’s “advanced search” feature. What options does this feature have that are not available in the general search? How do the results returned to you in advanced search differ from those you found in a general search?
How to Read a URL
By Christine Photinos, National University

Learning Objectives
- Develop information literacy strategies

URL stands for Uniform Resource Locator.

A URL is just the internet address for any given webpage:

Understanding the component parts of a URL can be helpful in a variety of situations. Here are just a few reasons why understanding URLs is useful:
- The URL often reveals key information about a site
- An understanding of URLs provides the needed foundation for many advanced search strategies
- A heightened attention to URLs helps searchers recognize fraudulent sites

Each section below focuses on a different part of the URL.

Locate the Protocol
The "protocol" is the first part of URL. Some browsers simplify how addresses are displayed by hiding the protocol: for example, in Chrome and Firefox, http://writingcommons.org displays as writingcommons.org.

The protocol https indicates that information sent through the page will be encrypted, and therefore harder to read if some third party intercepts the information. (The next time you are entering a username and password on a page, check for the "https" protocol.)

Locate the Domain Name
The "domain name" identifies the site that contains the page you are viewing. It appears just before the first single slash (/). If there is no single slash, then the domain name is whatever appears at the end of the URL.

For example, the following URLs all refer to pages on the Writing Commons site:
- http://writingcommons.org/open-text/information-literacy
- www.writingcommons.org

If you look carefully, you will see that most browsers try to help users out by boldfacing the domain name in the address bar. Example:

Being able to locate the domain name in a URL allows you to identify the entity that hosts the page you are viewing—a piece of information that is often crucial to understanding the nature of your source.

Recognize Sub-directories
Elements of the URL that appear after the domain indicate different sub-directories. For example:

In the example above, "open-text," "information-literacy," and "rhetorical-analysis" are sub-directories of the domain writingcommons.org. Think of these as folders within folders.

Recognize Subdomains
Subdomains are similar to sub-directories in that they provide a way for website developers to separate content, but subdomains appear before the domain name in the URL. Don't let this trip you up. The domain name is still the content that appears pressed up against the first single slash (/) or—if there is no single slash—at the very end of the URL.

For example, the domain name in all of the following URLs is google.com
- www.google.com
- books.google.com
- https://accounts.google.com/Login

Pay attention to the placement of the dots. The following is not a Google page:
- www.mgoogle.com

Here the domain is mgoogle.com, not google.com.
Recognize Top-level Domains

In the domain name writingcommons.org, the “top-level domain” is .org. The top-level domain .org was originally intended for use by non-profit organizations—and many non-profits continue to use it—but it is now open to anyone.

In the domain name amazon.com, the top-level domain is .com. Short for “commercial,” .com is the most common top-level domain in the world and is now used for a wide variety of sites—not just the sites of commercial enterprises.

Some top-level domains have retained their original meanings and are especially helpful to know:

<table>
<thead>
<tr>
<th>domain</th>
<th>description</th>
<th>example</th>
</tr>
</thead>
<tbody>
<tr>
<td>.edu</td>
<td>university site</td>
<td><a href="http://www.nu.edu">http://www.nu.edu</a></td>
</tr>
<tr>
<td>.gov</td>
<td>government site</td>
<td><a href="http://www.senate.gov">http://www.senate.gov</a></td>
</tr>
<tr>
<td>.mil</td>
<td>military site</td>
<td><a href="http://www.army.mil">http://www.army.mil</a></td>
</tr>
</tbody>
</table>

Newer top-level domains such as .museum, .bike, and .clothing are not yet widely used. Some domains include a country domain extension—or “country code toplevel domain.”

Here are some examples:

<table>
<thead>
<tr>
<th>code</th>
<th>country</th>
<th>example</th>
</tr>
</thead>
<tbody>
<tr>
<td>.in</td>
<td>India</td>
<td>indianrail.gov.in</td>
</tr>
<tr>
<td>.de</td>
<td>Germany</td>
<td><a href="http://www.spiegel.de">www.spiegel.de</a></td>
</tr>
<tr>
<td>.ca</td>
<td>Canada</td>
<td><a href="http://www.cbc.ca">www.cbc.ca</a></td>
</tr>
<tr>
<td>.jp</td>
<td>Japan</td>
<td><a href="http://www.niconico.jp">www.niconico.jp</a></td>
</tr>
<tr>
<td>.uk</td>
<td>United Kingdom</td>
<td><a href="http://www.ima.org.uk">www.ima.org.uk</a></td>
</tr>
</tbody>
</table>

Pay attention to country domain extensions. When present in a URL, they represent a core component of the domain. Note, for example, that hydra.com and hydra.com.gr are different domains. The two are unrelated sites run by unrelated entities.

For a comprehensive list of top-level domains, consult one of the following:

- Wikipedia: List of Internet top-level domains
- IANA Root Zone Database

Use Your Understanding of URLs to Enhance Your Web Searching

Once you understand URLs, certain kinds of advanced search strategies become easier to conceptualize, remember, and implement—for example, filtering by domain and top-level domain.

Filter by top-level domain

If you know that the kind of information you are seeking is most likely to appear on a site with a particular type of top-level domain, you can restrict your search to this type of site using the site: search operator. For example, if you are seeking government documents on the topic of student loans, then a search for student loans site:gov will return only results with the top-level domain gov, filtering out a large number of sites that are not relevant to your research needs.

Filter by Domain

If you know the domain of the site on which your information will appear, you can use site: to search only that site.

For example, a search for sample tests site:dmv.ca.gov will return only pages located on the California Department of Motor Vehicles (DMV) website (the domain of which is dmv.ca.gov).

The site: operator works in all major search engines (Google, Bing, Baidu, DuckDuckGo, etc.).

Exercises

The immediate benefit of the exercises below will be to improve your ability to distinguish between real and fraudulent sites, but the exercises will also help you sharpen your overall URL-analysis skills by heightening your attention to the component parts of URLs.

1. Which of the following are eBay.com web pages? Do not go to the sites. (Some sites masquerading as legitimate sites may contain harmful underlying code). Just examine the URLs.

   4. http://68.112.112.34:8866/ebay.htm
   5. http://signin.ebay.com@10.19.29.2
   6. http://pages@ebay.com

2. Find the domain name in this URL:

   rmflbq1okjcpczqg.xcovscpcdsosseystje.yucfnjilobvnuwrwxynmsea.zydylilpchnufriszi.
   zydylipchnufriszi.zydylipchnufriszi.zydylipchnufriszi.nuyovbuski.bernadinecom/index.

   - 232 A Rhetorical Approach to Workplace Writing Practices
   - 233 Chapter 8: Research Methodologies in Professional and Technical Communication
Smart Searching
By Anna Fidgeon, California State University

Learning Objectives

- Develop information literacy strategies

It's true. Searching a library catalog or database is not always as straightforward as Google. And sometimes, searching Google is frustrating because you get so many questionable results. So how can you make it easier to find strong sources for your paper? This video (https://www.youtube.com/watch?v=FF9uvjat1P0) will show you some tactics to help get you on your way to being a Super Searcher!

Boolean Operators and Other Tricks

In the video, you saw a search done with Boolean Operators in the Academic Search Elite database, but many library databases work in a similar way.

Boolean Operators are connector words that tell a database or search engine what kinds of results you want. Try thinking of Boolean Operators as Venn Diagrams where each circle represents one of your keywords and the dark area is your results:

<table>
<thead>
<tr>
<th>And</th>
<th>Or</th>
<th>Not</th>
</tr>
</thead>
<tbody>
<tr>
<td>Use AND to focus your results in a specific context. Narrows your search. “malnutrition AND poverty”</td>
<td>Use OR with synonyms or related terms. Broadens your search. “malnutrition OR hunger”</td>
<td>Use NOT to eliminate results with your keyword(s). Narrows your search. “malnutrition NOT obesity”</td>
</tr>
</tbody>
</table>

Let’s imagine that I’m researching poverty’s impact on malnutrition. Adding AND between my keywords will bring back only results using both my concepts. For example, “malnutrition AND poverty”. This will narrow my search.

I can get more results by brainstorming more keywords and adding OR between them. Adding OR will bring back results with either of your keywords. This works well when your keyword has synonyms or other related terms that won’t affect the context of the results. For example, “malnutrition OR hunger”.

NOT will eliminate results that include my keyword, even if it appears with another of my keywords. “Malnutrition NOT obesity” will eliminate results that talk about obesity, even if it’s about poverty’s effects on obesity.
Additionally, be sure to try a few different database or Internet searches. You don’t want to get into the habit of using the same database for all your research, nor should you expect a search engine to hold all of the world’s information (it doesn’t). Your library probably subscribes to general databases (JSTOR, ProQuest), as well as subject databases. These subject databases can range from Psychology, to Engineering, to Fine Arts, to anything your university teaches. If you're writing a paper for a psychology class, using a subject database will give you results from your discipline, so you don’t have to sort through results from other fields that may not be relevant to your assignment. Don’t limit yourself to what’s familiar—you might find what you’re looking for, or even something better, somewhere else.

### Question Your Assignment

One way to think about your topic is to form it into a question you can answer with evidence from your research. It might help get you thinking about what kinds of search results you want and also help you focus your topic so you don’t have to search through all the literature on a very broad topic. Here are some examples:

<table>
<thead>
<tr>
<th>Trick</th>
<th>What It Is</th>
<th>How &amp; Where to Use It</th>
</tr>
</thead>
<tbody>
<tr>
<td>*</td>
<td>Truncation: will search for your keyword + any endings, like immigrant, immigration, immigrants, etc.</td>
<td>immigra* Works in Google &amp; databases</td>
</tr>
<tr>
<td>**</td>
<td>Quotation marks: will search for your keywords together as a phrase and only as a phrase</td>
<td>“breast cancer” Works in Google &amp; databases</td>
</tr>
<tr>
<td>..</td>
<td>Date range: searches for results from a particular date range</td>
<td>2002..2012 Works in Google</td>
</tr>
<tr>
<td>site:</td>
<td>Site search: will search a particular website or domain</td>
<td>site:.gov Works in Google</td>
</tr>
<tr>
<td>author:</td>
<td>Author search: searches a particular author</td>
<td>author:carr Works in Google Scholar</td>
</tr>
</tbody>
</table>

I’m finding too much! I can’t find enough!

If you are overloaded or underwhelmed with search results, you might want to rethink your search strategy by brainstorming broader or narrower concepts. For example, if your topic for a 5-page paper is gay rights, do you think you could cover everything ever about gay rights in so few pages?

Most likely, with a topic as broad as gay rights, you probably want to focus your research a little more, for example, you might look at gay marriage. If you still feel like there’s too much on your topic to cover, focus in even more. For example, you could specifically look at Prop 8.
It might seem frustrating when you have to keep adjusting your search, but that's exactly what research is, it's re-searching until you find what you're looking for. If you feel really stuck, be sure to ask a librarian for help creating a search strategy.

**Exercises**

1. Using the topic for your next class project, develop a research question (such as the ones above) that is broad enough for you to research and narrow enough for you to cover fully in your project.

2. Using the research question you developed in question 1, develop a list of search terms and perform a search for sources. Is the information that you are finding relevant? If not, is your search too broad or too narrow? If your search is either too broad or too narrow, how might you revise your research question and list of search terms to get more relevant results?

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Chapter 9: Common Genres

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## Memos

by Lee Ann Hodges, Tri-County Community College

### Learning Objectives

- Compose professional/workplace documents and oral presentations for multiple audiences and specific purposes using appropriate technologies
- Design documents, visuals, and data displays that are rhetorically effective, accessible and usable for specific audiences
- Apply/adapt professional writing conventions, including genre, tone, and style for particular writing situations

Short for “memorandum,” a memo is a type of document used to communicate with others in the same organization. Memos (or memoranda) are typically used for fairly short messages of one page or less, but informal reports of several pages may also employ memo format. Memos are distinguished by a header that includes DATE, TO, FROM, and SUBJECT lines. Other lines, such as CC or BCC, may be added as needed. An RE (“Reference”) line may be used instead of SUBJECT, but this use is becoming rarer as “RE” is often mistaken as “Reply” because of its use in email.

- **DATE:** List the date on which the memo is distributed.
- **TO:** List the names of the recipients of the memo. If there are several recipients, it’s acceptable to use a group name, such as “All Employees” or “Personnel Committee Members.”
- **FROM:** List the name and job title of the writer(s).
- **SUBJECT:** Think of the SUBJECT line as the title for the memo. Make it specific so that readers can immediately identify the topic.

These headings may be double- or single-spaced, and the SUBJECT line is often in all capital letters. Furthermore, the order of the items can vary. Many organizations have their own style preferences on these issues. If not, the order listed above, double-spaced, is the most common.

The text of memos typically uses block format, with single-spaced lines, an extra space between paragraphs, and no indentions for new paragraphs. However, if a report using memo format stretches to a few pages in length, double spacing may be used to improve its readability.

### Organization

Professional communication forms are organized according to one of two strategies: Direct and indirect.

- **The direct organization strategy** presents the purpose of the document in the first paragraph (sometimes the first sentence) and provides supporting details in the body.
- **The indirect organization strategy** opens with relevant, attention-getting details that do not directly state the purpose of the document. The purpose is revealed in the body of the message, usually sandwiched between supporting details.

<table>
<thead>
<tr>
<th>Organization Strategy</th>
<th>Definition</th>
<th>Type of Document</th>
<th>Content</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td>Introduction</td>
</tr>
<tr>
<td>Direct</td>
<td>Writer arrives at purpose quickly, sometimes in the first sentence.</td>
<td>Used for good news or routine communication (audience is receptive or neutral)</td>
<td>Purpose</td>
</tr>
<tr>
<td>Indirect</td>
<td>Writer gradually builds up to the purpose, which is stated in the body.</td>
<td>Used for negative, persuasive, or sales messages (audience is not receptive)</td>
<td>Relevant, attention-getting statements</td>
</tr>
</tbody>
</table>

The direct approach is used for good news or routine communication; the indirect approach is used for persuasive, sales, or bad news messages.

A directly stated purpose is welcome in good news or routine messages but could be viewed as abrupt or insolent in a bad news or persuasive message. When the audience is not receptive to the message, it is best to lead up to the message gradually.

In both types of organization, action information (such as deadlines or contact information) or a courteous closing statement is placed in the last paragraph.

<table>
<thead>
<tr>
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<th>Definition</th>
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<th>Content</th>
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<td>Relevant, attention-getting statements</td>
</tr>
</tbody>
</table>
Sample Direct Memo

Memorandum

DATE: March 18, 2013
TO: Department Managers
FROM: Safiya Dev, Store Manager
SUBJECT: Customer Service Excellence Nominations

Please submit your nominations for the quarterly Customer Service Excellence Award by April 8. Help us identify great employees!

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 he or she deserves!

According to nominating criteria, nominees must:

- demonstrate excellent customer service consistent with Variety Craft Supplies' policies;
- have worked at 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 nominating 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.

Sample Indirect Memo

Memorandum

DATE: February 25, 2013
TO: All employees
FROM: Kirk James, Call Center Supervisor
SUBJECT: Change in Operating Hours

Our call center has been experimenting with a half-day Friday work schedule over the last year, and we've recently conducted an evaluation to determine how well the program is working.

When a client calls to order their diabetic supplies on Friday afternoon, our messaging system directs them to complete their order on our company website. While many customers are willing and able to do this, many do not have internet access (hence the reason for their call in the first place). Their only other option is to wait until Monday to place the order, and if a customer is already low on supplies, this may be untenable.

Customers who are calling with questions or to resolve issues with an order must also wait for Monday.

We have received positive comments, especially from our West Coast customers, about the extended hours we are open in the evening. We have determined that to continue to offer top-notch customer service, we must also re-establish Friday afternoon hours. However, that does not mean that we cannot offer employees some scheduling perks. In fact, the addition of later hours Monday through Thursday provides us with more leeway in scheduling employees.

We will have a staff meeting on Monday, March 4, at 8:00 a.m. to discuss new scheduling procedures. To the extent possible, we wish to accommodate employees' preferences in scheduling, so it is important to attend this meeting to have your voice heard.

Style and Tone

While memo reports and policy memos are examples of documents that have a more formal tone, most memos will have a conversational style—slightly informal but still professional. The audience of memos are those with whom the writer works, so the writing style usually assumes a relationship with them (and therefore a certain lack of formality); just keep in mind that the relationship is a professional one, so the writing should reflect that. Furthermore, as with all workplace documents, the audience may contain a variety of readers, and the style and tone should be appropriate for all of their technical and authority levels.
Too Informal | Too Formal, Stuffy-Sounding, Wordy | Appropriate Balance
---|---|---
Hi, everyone. Hope you had a great weekend. You know those awards we give out every so often? It’s time for those again! | Variety Craft Supplies’ mission is to provide customers with affordable, quality supplies with superb customer service. Excellent customer service includes being knowledgeable about the supplies, but it also goes beyond that. It’s about having the right attitude about helping customers. It’s time to reward employees who have a customer-oriented outlook. | Direct and concise opening states the purpose of the memo. Please submit your nominations for the quarterly Customer Service Excellence Award by April 8. Help us identify great employees!

Common Memo Writing Situations
Memos are used in a variety of workplace communication situations, from documentation of procedures and policies to simple announcements. Below are some common types of memos:

- Policies (changes and new)
- Instructions
- Procedures
- Announcements
- Trip reports

Distribution Medium
Memos may be distributed manually through print in organizations in which not all employees have access to email. Organizations with access to email may distribute memos as attachments to email.

In organizations in which email reaches every employee (or every employee in the memo’s audience), writers must determine whether to send a memo or an email message to convey their information. In cases such as this, writers should consider three factors: the nature of the message, the depth/number of its details, and its likelihood of being printed for easier reference. These types of messages should be written up in memo format and attached to an email message for fast (and environmentally friendly) distribution:

- Messages that have an official aura, such as new policies or revisions of policies.
- Messages containing much detail (such as instructions on how to calibrate a complicated piece of machinery).
- Messages requiring reference away from a computer (necessitating a print copy). Print copies of emails generally use a small type that is difficult to read.

*Some articles are used across multiple genres and disciplines.

Exercises
1. Imagine that you are managing a company, Unique Manufacturing, which is changing its policy for paid time-off requests. Previously, employees could take any accrued vacation time without notice. Recently, however, this policy has been abused, with several employees from the same department using their accrued vacation days at the same time, leaving the department significantly understaffed at times. Because of this, vacation days must be requested a minimum of 4 weeks in advance, and only one employee per department will be approved for vacation at any given time. Write a memo to your employees that explains this policy.

2. Find an example of an ineffective memo online. What about the memo is ineffective? Now, rewrite the memo, and tell us about your choices.
Press Releases
By Katherine McGee, University of South Florida

### Learning Objectives
- Compose professional/workplace documents and oral presentations for multiple audiences and specific purposes using appropriate technologies
- Apply/adapt professional writing conventions, including genre, tone, and style for particular writing situations

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 the media. Press releases include the following content and organization:

- **An informative title** that allows the reader to identify the main idea of the press release and decide if he or she wants to read the full text.
- The date and location from which the press release was released.
- **The body of the press release.**
- Information about the company or organization that released the press release.

One of the most important things to know and remember about press releases is that they are meant for a general audience. While much of your technical writing may be for subject matter experts or business personnel who are at least vaguely familiar with your topic and who have at least some college education, press releases should reach people with different areas of expertise and of all educational backgrounds. This audience determines several other aspects of the press release, including content, type of language, and tone.

### Content
As fascinating as you may find transmissions, electronic medical records systems, or sports teams’ updates to be, not all readers will share that same level of 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 for the announcement, and then move on to the announcement itself.

Generally, you will begin by providing one or a few sentences giving the most pertinent information you want the public to know. You will then spend the next few paragraphs adding brief contextual information and providing additional details about the product, event, or situation. 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 your background information.

While there is no official word limit for press releases (although your individual media outlet may have such requirements), the key is to be brief. Also, use short paragraphs so that the content is easy to skim. Press releases are not novels, meant for enjoyment; they are meant to be read quickly.

### Language
Avoid using technical jargon. It is also better to use more simplistic language in general so that you can reach people of different educational backgrounds. Assuming you are writing to an American audience, remember that we are a melting pot, and we have a large number of citizens whose first language is not English. Furthermore, shorter sentences are better than longer ones in this type of communication. The average reader doesn’t want to wade through clunky sentences; they want to get the information and move on to a new topic.

### Tone
Your tone should be informational and relatively formal. While it’s acceptable to show enthusiasm about your topic, note that a press release is not an advertisement.

Check out this press release, “Travel Journalists Honor Visit Tampa Bay” (http://www.visittampabay.com/media-room/news/details/?nid=108), written by Kevin Wiatrowski for Visit Tampa Bay’s “Unlock Tampa Bay” website. The content, language, and tone are aimed at a general audience that knows little about their topic. The press release informs the audience about the successes that Visit Tampa Bay has had and gives a brief explanation of how the organization has drawn that recognition in the past few years without providing extensive examples and details. The language is simple, avoiding any technical jargon, and it includes one quotation from someone within the organization in order to provide insight from a subject matter expert, still without addressing topics that the audience would need a business or travel and tourism degree to understand. Furthermore, the tone is informational and formal; the article informs of the organization’s successes without sounding pretentious.

Finally, let’s take a look at the format of the press release and how it conforms to genre expectations. The title of the press release identifies the main topic of the piece—that Visit Tampa Bay has received some sort of commendation. Then, the press release follows genre expectations by including the date, the author, and the location. The first sentence, “The North American Travel Journalists Association has named Visit Tampa Bay, Hillsborough County’s not-for-profit tourism marketing company, as the Grand Prize winner among destination marketing organizations in the NATJA’s 2014 awards competition,” provides the most essential information, and then the remainder of the press release provides additional details. You will notice that the paragraphs throughout the press release are short, thus making the document easy to skim quickly. Finally, the article ends with information about Visit Tampa Bay, the organization that published the article.

### Exercises
1. Find a press release that addresses a topic in your field of study. Consider what information it includes, the type of language it uses, and the tone it incorporates. How do the content,
language, and tone differ from how a piece would use these items if they were written for a technical audience? In other words, how does this press release reach a general audience rather than only people who are experts in the field?

2. Find a press release that addresses a topic outside of your field of study. Are you able to understand the article? How does the writer use appropriate content, language, and tone in order to reach you, a non-expert in that field?
Proposal Writing for Grants: A Brief Introduction

By Johanna Phelps-Hillen, University of South Florida

Learning Outcomes

• Compose professional/workplace documents and oral presentations for multiple audiences and specific purposes using appropriate technologies

Proposal Writing: The Basics

Proposals—colloquially called 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 is, then, at its most basic, writing for resources. As Karsh and Fox (2014) aptly note, “we often use the term ‘grant writing’ as a term in common usage, strictly speaking, [for] one doesn't write grants, one writes proposals in order to win grant; grants are a reward for excellent proposal writing (xiii).”

More so, perhaps, than other technical and professional writing endeavors, proposal writing has immediate funding opportunities directly attached to the document a writer creates. 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. Often, proposals are written primarily on behalf of nonprofit and government agencies, but practiced characteristics such as effective verbal and written interpersonal communication, heightened audience awareness, research expertise, and clear writing make for both successful federal grant proposals and personal scholarship applications. Viewing the skill of proposal writing in this way implies that proposal writers are able to identify and balance key components of rhetorical situations—such as kairos, logos, ethos, and pathos—and use knowledge, networks, and technical writing skills to their advantage.

Sometimes, organizations have departments or groups that focus on resource development, fundraising, 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.

Though this list is not exhaustive, here are some considerations of successful proposal writers 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 guidelines typically are 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.

Let’s put it this way: it doesn’t even matter how excellent your ideas are, or how novel 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’ve not written past the page limit. If you have questions about the guidelines, or they don’t seem to exist, 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 they’ve done their homework on the potential funder, are well versed on the project to be implemented, and understand the fiscal management of the funds, proposal writers 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 in to 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 sections, 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!

**Recommended Reading**


**Exercises**

1. Have you ever applied for a scholarship?

   **If you have,** pull up that application and, if possible, match it up against the requirements for submission. Consider the following questions:

   • Did you meet all the requirements for the application?
   • If you received the scholarship, why do you think you did?
   • Did you contact the funding organization? If not, why not? If so, how did that conversation go? How could it have gone better?
   • What sort of organization was offering the scholarship? What was their mission, vision, and strategic plan?
   • Did what you have to say fit into the organization’s goals?
   • Looking back at the document you submitted, how do you think you could have framed your application differently, especially if there was a personal statement involved?

   **If you haven’t,** now would be a good time to put your new knowledge to good use! Pull out your CV or resume and peruse your institution’s scholarship database for a good match. Once you’ve found a scholarship that looks like a good fit, consider the following questions as you take a look at your materials:

   • Do you meet all the requirements for the application?
   • If you were to receive the scholarship, why do you think you would?
   • Would you contact the funding organization? Why or why not? What sort of questions would you ask the funding organization?
   • What sort of organization is offering the scholarship? What is their mission, vision, and strategic plan?
   • Did what you have to say fit into the organization’s goals?
   • Looking back at the document you’ve created, how could you frame your application differently, especially if there was a personal statement involved?

**References**

Formal Reports: Writing Guidelines for Students

By Angela Eward-Mangione and Katherine McGee, University of South Florida

<table>
<thead>
<tr>
<th>Learning Objectives</th>
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</thead>
<tbody>
<tr>
<td>• Compose professional/workplace documents and oral presentations for multiple audienc-es and specific purposes using appropriate technologies</td>
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<td>• Design documents, visuals, and data displays that are rhetorically effective, accessible and usable for specific audiences</td>
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<td>• Apply/adapt professional writing conventions, including genre, tone, and style for particu-lar writing situations</td>
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</table>

Many business professionals need to write a formal report at some point during their careers, and some professionals write them on a regular basis. Key decision makers in business, education, and government use formal reports to make important decisions. As opposed to informational reports that offer facts and information without analysis, formal reports provide the end product of a thorough investigation with analysis. Although writing a formal report may seem like a daunting task, the final product enables you to contribute directly to your company’s success.

There are several different organizational patterns that may be used for formal reports, but all formal reports contain front matter (prefatory) material, a body, and back matter (supplementa-ry) items. The prefatory material provides the audience with an overview and a roadmap of the report. The body of a formal report discusses the findings that lead to the recommendations. The back matter items include the references and any necessary appendices or glossary.

Because identifying audience needs and ex-pectations is essential to any type of writing, especially formal reports, consider reading “Audience Analysis: Primary, Secondary, and Hidden Audiences” to grasp the principles necessary for analyzing the audiences of formal reports. Additionally, remember that clarifying the expectations of your audience is a critical step to take before writing your report. What does your audience expect to get out of reading your report? What is its purpose? Make sure that you have spe-cifically responded to the expectations of your boss, manager, or client. If your audience expects you to include research, make sure you know what type of research they expect. Do they want research from scholarly journal articles? Do they want you to conduct your own research? No matter what type of research you do, make sure that it is properly documented using whatever format the audience prefers (MLA, APA, and Chicago Manual of Style are some of the most commonly-used formats). You should also establish a strong ethos in your report. Use confident language that shows that you have done your research and present them with the research.
Contrary to what is expected in other types of writing, in business reports, passive voice is sometimes preferred. If the action is more important than the person doing it, use the passive rather than the active voice.

A few phrases you might use include:

- The data analyzed in this report shows . . .
- This study was designed to analyze . . .
- The data was collected . . .
- 500 students were surveyed . . .

The remainder of this article builds upon these concepts by providing information about writing each part of a formal report— the front matter, the body, and the back matter.
Front Matter Components

By Angela Eward-Mangione and Katherine McGee, University of South Florida

### Learning Outcomes

| • Compose professional/workplace documents and oral presentations for multiple audiences and specific purposes using appropriate technologies |
| • Design documents, visuals, and data displays that are rhetorically effective, accessible and usable for specific audiences |
| • Apply/adapt professional writing conventions, including genre, tone, and style for particular writing situations |

### Title Page

The title page provides the audience with the:

- **Name of the report**
  - This should appear 2 inches from the top margin in uppercase letters.
- **Name, title, and organization of the individual receiving the report**
  - Type “Prepared for” on one line, followed by two separate lines that provide the receiving organization’s name and then the city and state. Some reports may include an additional line that presents the name of a specific person.
- **Name of the author and any necessary identifying information**
  - Type “prepared by” on one line, followed by the name(s) of the author(s) and their organization, all on separate lines.
- **Date of submission**
  - This date may differ from the date the report was written. It should appear 2 inches above the bottom margin.

The items on the title page should be equally spaced apart from each other.

**A note on page numbers:** The title page should not include a page number, but this page is counted as page “i.” Use software features to create two sections for your report. You can then utilize two different types of numbering schemes. When numbering the pages (i.e., i, ii, iii, etc.) for a formal report, use lowercase roman numerals for all front matter components. Utilize Arabic numerals for the other pages that follow. Additionally, if you intend to bind the report on the left, move the left margin and center 0.25 inches to the right.

**A note on font:** If there is no specific preference for serif vs. sans serif font, choose one and use it consistently throughout the report. Do not utilize anything besides a traditional serif (e.g., Times New Roman) or sans serif (e.g., Arial or Calibri) font.
Letter of Transmittal

A letter of transmittal announces the report topic to the recipient(s).

If applicable, the first paragraph should identify who authorized the report and why the report is significant. Provide the purpose of the report in the first paragraph as well. The next paragraph should briefly identify, categorize, and describe the primary and secondary research of the report. In the concluding paragraph, offer to discuss the report in greater detail. It is also customary to conclude by thanking the reader for their time and consideration.

The letter of transmittal should be formatted as a business letter. Some report writers prefer to send a memo of transmittal instead.

When considering your audience for the letter or memo of transmittal, make sure that you use a level of formality appropriate for your relationship with the reader. While all letters should contain professional and respectful language, a letter to someone you do not know should pay closer attention to the formality of the word choice and tone.

Table of Contents

The table of contents page features the headings and secondary headings of the report and their page numbers, enabling audience members to quickly locate specific parts of the report.

Leaders (i.e. spaced or unspaced dots) are used to guide the reader's eye from the headings to their page numbers.

The words “TABLE OF CONTENTS” should appear at the top of the page in all uppercase and bolded letters. Type the titles of major report parts in all uppercase letters as well, double spacing between them. Secondary headings should be indented and single spaced, using a combination of upper- and lowercase letters.

Executive Summary

An executive summary presents an overview of the report that can be used as a time-saving device by recipients who do not have time to read the entire report.

The executive summary should include:

• Summary of purpose
• Overview of key findings
• Identification of conclusions
• Overview of recommendations

To begin, type “EXECUTIVE SUMMARY” in all uppercase letters and centered. Follow this functional head with paragraphs that include the above information, but do not use first-level headings to separate each item. Each paragraph of information should be single-spaced with double spacing between paragraphs. Everything except for the title should be left-aligned.

An executive summary is usually ten percent of the length of the report. For example, a ten-page report should offer a one-page summary. A 100-page report should feature a summary that is approximately ten pages.
Body of Report

By Angela Eward-Mangione and Katherine McGee, University of South Florida

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</table>

Introduction

The body of a formal report begins with an introduction. The introduction sets the stage for the report, clarifies what need(s) motivated it, and orients the reader to its structure.

Most report introductions address the following elements: background information, problem or purpose, significance, scope, methods, organization, and sources. As you may have noticed, some parts of a formal report fulfill similar purposes. Information from the letter of transmittal and the executive summary may be repeated in the introduction. Reword the information in order to avoid sounding repetitive.

To begin this section, type "BACKGROUND" or "INTRODUCTION" in all uppercase letters. This functional head should be followed by the information specified above (i.e., background information, problem or purpose, etc.). You do not need to utilize any first-level headings in this section.

Because this section includes background information, it would be the appropriate place to address the needs of audiences that may need additional knowledge about the topic. Provide definitions of technical terms and instruction about the overall project if necessary. If you are uncertain if your audience needs a particular piece of information, go ahead and include it; it's better to give your reader a little bit too much background than not enough.

Discussion of Findings

The Discussion of Findings section presents the evidence for your conclusions. This key section should be carefully organized to enhance readability.

To begin, type "DISCUSSION OF FINDINGS" in all uppercase letters. Center this and all other functional heads. Follow "DISCUSSION OF FINDINGS" with a brief paragraph that previews the organization of the report.

Useful organizational patterns for report findings include but are not limited to:

• Best Case/Worst Case
• Compare/Contrast
• Chronology
• Geography

Integrating Graphics

Formal report authors use graphics to present data in different forms. Paragraphs of text and complex or numerical data tend to bog readers down, making graphics a beneficial enhancement. Graphics also make data easier to understand, so they sometimes make a stronger impact on the audience.

Knowing when—and how—to effectively employ graphics is the key to successfully integrating them. Keeping the audience in mind is also critical.

The following chart summarizes uses and audience benefits for the most frequently employed types of graphics. The types of graphics are presented alphabetically to make them easier to remember.
<table>
<thead>
<tr>
<th>GRAPHIC Graphic Type</th>
<th>USE This type . . .</th>
<th>BENEFITS The audience can . . .</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bar Chart</td>
<td>Represents data with the height or length of rectangular bars</td>
<td>Compare items; Grasp a series of numbers</td>
</tr>
<tr>
<td>Flowchart</td>
<td>Illustrates a sequence of events with shapes connected by arrows</td>
<td>Grasp a series of steps</td>
</tr>
<tr>
<td>Line Chart</td>
<td>Shows changes in quantitative data over time or plots the relationship between two variables with one or more lines</td>
<td>Compare variables; Visualize change over time</td>
</tr>
<tr>
<td>Map</td>
<td>Illustrates activities or trends on a map that represents geographically organized parts of a region, country, or the world</td>
<td>Compare geographical trends; Grasp geographical relationships</td>
</tr>
<tr>
<td>Pie Chart</td>
<td>Depicts distribution of parts in a whole with wedges in a circle graph</td>
<td>Compare significance of parts and parts-to-whole relationship(s)</td>
</tr>
<tr>
<td>Table</td>
<td>Presents data or values in rows and columns</td>
<td>Compare data or values; Grasp relationships between data or values</td>
</tr>
</tbody>
</table>

Computers have made it easier for professionals to create effective graphics. Most of the graphics described in the chart can be created in Microsoft Office Word and Excel.

There may also be some occasions in which a formal report includes graphics from a particular print or online source. In these instances, it is critical to include a caption that presents the source of the graphic.
Back Matter Components

By Angela Eward-Mangione and Katherine McGee, University of South Florida

<table>
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Conclusions and Recommendations

The conclusions and recommendations section conveys the key results from the analysis in the discussion of findings section. Up to this point, readers have carefully reviewed the data in the report, so they are now logically prepared to read the report’s conclusions and recommendations.

Type “CONCLUSIONS AND RECOMMENDATIONS” in all uppercase letters. Follow this functional head with the conclusions of the report. The conclusions should answer any research questions that were posed earlier in the report. Present the conclusions in an enumerated or bulleted list to enhance readability.

Recommendations offer a course of action, and they should answer any problem or research questions as well. Think about the expectations of your audience members. Have all of their requirements been addressed?

Works Cited

All formal reports should include a works cited page; this page documents the sources cited within the report. The recipient(s) of the report can also refer to this page to locate sources for further research.

It is acceptable to follow MLA (Modern Language Association), CMS (Chicago Manual of Style), or APA (American Psychological Association) documentation style for entries on this page. Arrange all sources alphabetically. Refer to the latest edition of the appropriate style handbook for more information about how to format entries for print and electronic sources on the Works Cited Page.
Conclusion

While some of these formatting rules may seem tedious at first, they are necessary in order for your audience to better understand the report. Using a regulated format allows for a more universal organization that everyone will understand. Being aware of your audience’s needs and expectations will allow for a strong report that will satisfy your employee and will demonstrate your competence in your field.

Exercises

1. Identify and describe the purpose of a formal report.
2. Explain the difference between the front and back matter components.
3. Find three examples of formal reports in your field of study and consider the organization and format of the reports. What sections do the reports have? How are those sections labeled? What order are they in? How are the sections formatted? In a group of three or four students, compare and contrast the three reports. In those three examples, look at what the writer(s) do(es) to meet the needs of the audience. What types of language are used (e.g., passive or active voice, concrete or abstract language)? How is the information described and analyzed in a non-biased manner (e.g., amount of detail and choice of words in descriptions, use of pronouns, and absence of biased language)? In a group of three or four students, discuss and evaluate the reports’ use of language.
Audiovisual Presentations Made Easy(-ier): Tips for Creating an Effective PowerPoint, Prezi, or Keynote

By E. Jonathan Arnett, Kennesaw State University

<table>
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At some point in your academic or professional life, you'll have to stand in front of people and give a talk about a subject, and quite often, you'll be asked to prepare visual materials to accompany your talk. You might prepare handouts, but odds are, you'll be asked to prepare materials that you can project on a video screen.

The classic version of these projected materials is the overhead transparency, a thin sheet of clear plastic that you can run through a laser printer or write on with special markers; this medium is slowly disappearing, but it's still around. Sometimes, you might be able to prepare paper documents and project them to a screen via a document camera, but doc cams aren't entirely common, and they can only present static images. Instead, you'll usually be asked to create a dynamic presentation using software such as PowerPoint, Prezi, or Keynote. Many other programs exist, including what Google has to offer, but these are the three most common presentation programs.

Each program has its own special abilities and strengths, but they all share common basic principles that you can manipulate to create memorable, effective, and interesting presentations. Here, you'll learn basic principles to:

• select an effective presentation format
• choose readable typefaces
• place visual elements onscreen
• choose colors
• select appropriate backgrounds
• choose visual and audio effects, and
• deliver a memorable, effective presentation.

Three Major Presentation Formats
You can choose from three basic types of format for a presentation based on PowerPoint, Prezi, or Keynote:
What’s HTML?

- HTML is an initialism:
  - HyperText Markup Language
- It uses “tags” to tell the browser how to display content onscreen.
  - Tags don’t show up onscreen.
- The World Wide Web Consortium develops standards for HTML.
  - Its current version is HTML 5.

Bullet Points. The bullet point format is the default layout that most PowerPoint users and viewers are familiar with. Slides created in this format commonly include a title across the top and a cascading series of bulleted lines of text inside a slide’s main text box. An example of this kind of slide appears below, in Figure 1.

Figure 1. PPT slide using bullet point format

Bullet point-format presentations have several benefits:
- They are easy to prepare. Just type, press Enter for a new line, and press Tab to create a smaller bullet or Shift+Tab to make a larger bullet.
- They are useful for highlighting important words or naming concepts that an audience needs to learn.
- They project a serious tone.

However, bullet-point format presentations also can be boring, and an overload of words will make your audience cringe. You have probably endured at least one bad PowerPoint in your life, and odds are, that bad presentation used the bullet point format.

Illustrated Points. The illustrated points format is similar, but slides created in this type of presentation focus on pictures, and text appears in a supporting role. An example of this kind of slide appears in Figure 2.

Figure 2. PPT slide using illustrated points format

Illustrated points-format slides have several benefits:
- They are excellent for showing conceptual relationships or demonstrating physical relationships between objects.
- People often respond positively to pictures, so illustrated points-format slides also tend to capture viewers’ interest more than all-text presentations do.

These slides require more detailed preparation, though, and they tend to be more visually “busy,” so if your audience has problems concentrating, or if it’s vital that you highlight important words, you may want a more text-based approach.

Illustrated points-format slides can also be combined with bullet point-format slides inside the same presentation. See Figure 3 for an example of a PowerPoint that includes both types of slide.
As an excellent example of what not to do, consider Peter Norvig's classic Gettysburg Power-Point: [http://norvig.com/Gettysburg/](http://norvig.com/Gettysburg/). It's a satirical example of how an excellent speech—in this case, Abraham Lincoln's famous Gettysburg Address, widely considered one of the classic speeches in the English language—can be ruined by using presentation software default settings and following a built-in template without modifying it.

### How to Choose a Typeface

When you create a presentation, make sure that the fonts you choose are:
- appropriate for the subject and audience
- readable from anywhere in the room, and
- compatible with the computer you'll be using for the presentation.

#### Appropriateness.

Each typeface projects a visual “personality” of some sort, and you should match the font with the audience and subject you're addressing. For example, Comic Sans is a cheerful, happy-looking font and projects a somewhat childlike ethos; it's a good match for an upbeat subject for a younger audience. In contrast, Times New Roman is a much more serious-looking font and would be appropriate for an older audience discussing a serious subject.

#### Readability.

Not all fonts are equally readable, and you need to pick typefaces that allow your audience to read what's onscreen from the back of the room. You should choose fonts that:
- have relatively tall lower-case letters
- don't use extra-thick or extremely thin lines
- have large, open spaces inside the loops, and
- (for a serif font) have large, blunt serifs.

See Figure 5 for examples of typefaces available in PowerPoint, and consider which fonts are most and least readable onscreen.

### Sample Typefaces

<table>
<thead>
<tr>
<th>Tahoma</th>
<th>Georgia</th>
</tr>
</thead>
<tbody>
<tr>
<td>Book Antiqua</td>
<td>Impact</td>
</tr>
<tr>
<td>Agency FB</td>
<td>Bookman Old Style</td>
</tr>
<tr>
<td>Trebuchet</td>
<td>ALGERIAN</td>
</tr>
<tr>
<td>Garamond</td>
<td>Verdana</td>
</tr>
<tr>
<td>Bauhaus 95</td>
<td>Baskerville Old Face</td>
</tr>
</tbody>
</table>

Figure 5. Examples of readable and unreadable font choices

Whichever format you choose, remember that the presentation software is your servant; don't let it tell you what to do. Always modify a template to suit your needs.
Of these twelve fonts, the fonts that are most readable onscreen are Tahoma, Georgia, Trebuchet, and Verdana. In fact, Georgia and Verdana were designed for use onscreen. Of the rest, only Book Antiqua is workable, but the letters' thin parts can be hard to see onscreen, particularly if the background isn't a single flat color.

Sans-serif fonts are usually easier to read onscreen than serif fonts are, so consider using a serif font for headings and a sans-serif font for slides' main text. Also, limit yourself to two fonts. If you use more, the screen will look very busy, and the visual clutter may distract your audience. Most programs have built-in lists of fonts that you can use. For example, PowerPoint 2013 includes the list of combinations that appears in Figure 6.

Figure 6. List of built-in font combinations in PowerPoint 2013

Here is a link to a brief YouTube video that demonstrates how to access PowerPoint's built-in list of font combinations: https://www.dropbox.com/sh/812erramyb8lyj/AAAdwNcH2rqBr1_FgJg-cxl3gsa/PowerPoint%20built-in%20font%20combinations.mp4?dl=0.

Feel free to use one of these combinations, but remember that just because they're built-in doesn't mean they're well-chosen or appropriate for your needs. You should always consider changing the default settings.

Compatibility. Not every typeface is available on every operating system, so find out what kind of computer you'll use while delivering the presentation and choose fonts that will work on that computer.

For example, Helvetica is available on Mac, but it is not available on Windows-based systems; the Windows equivalent to Helvetica is Arial. Thus, if you create a PowerPoint presentation on a PC and then open the file on a Mac, or vice versa, the fonts may not transfer over, and your PowerPoint's appearance will change, often for the worse. Here's a link to a list of fonts shared by Mac and PC versions of Microsoft Office: http://new.office-watch.com/2013/common-fonts-office-for-mac-office-for-windows/.

How to Think about Layout

When you place text or pictures onscreen, make sure you:

- apply the CRAP design principles
- avoid clutter, and
- avoid text overload.

CRAP Principles. The CRAP design principles are Contrast, Repetition, Alignment, and Proximity. In brief, they work like this:

Contrast: If things aren’t in the same category, make them look very different (e.g., use different fonts for slide headings and main text).

Repetition: Make visual elements consistent throughout every slide (e.g., use consistent colors, callout shapes, font sizes, picture and text box locations, background images).

Alignment: Place things on the screen with a purpose. Don’t just plop images and text in random locations (e.g., equalize spaces between multiple pictures, consistently center or left-align text, line up bullets and numbers).

Proximity: Place related items close to each other (e.g., use a narrow space between a name and job title, a picture and its caption, a main bullet item and its related sub-bullet items).

(The CRAP acronym was invented by a graphic designer named Robin Williams [no, not that Robin Williams] and explained in her book The Non-Designer’s Design Book. If you’re interested in visual design, you might find it fascinating.)

When you design your PowerPoint, you should consider using the built-in Master Slide tool to make sure the visual design elements (e.g., fonts, colors, backgrounds, bulleted items’ alignment) follow the Repetition principle. Here is a link to a YouTube video demonstrating how this powerful function works: http://www.youtube.com/watch?v=FA5aZ4Qk5RE.

Clutter. Keep your presentation’s design and contents relatively simple.

- Include spaces between lines of text.
- Include spaces between images or other visual elements.
- Make sure that the text is readable.
- Use simple graphics.

If you overload the screen, your audience will feel overwhelmed, and they won’t be able to follow your ideas.

For example, Figure 7 demonstrates a cluttered information graphic full of “chartjunk.” Its 3-D design is unnecessary, the forced perspective prevents the audience from seeing the towers' actual heights, the callouts overlap, the towers' transparency doesn't provide any information about the data they represent.

Feel free to use one of these combinations, but remember that just because they're built-in doesn't mean they're well-chosen or appropriate for your needs. You should always consider changing the default settings.
Similarly, avoid stuffing slides full of text and creating a "wall o’ words" like in Figure 9. Too much text makes a slide difficult to read and will intimidate your audience.

**THE PROBLEM WITH COLLEGE-LEVEL EDITING CLASSES**

College-level editing classes are at an inflection point.

We used to teach
- copyediting and proofreading marks
- levels of edit
- basic document design
- English grammar and mechanics
- how to work with authors

These skills are valuable, but they’re becoming outmoded.

Editors need to learn soft-copy editing skills based on specific technologies
- MS Word: Styles, Track Changes, comment bullets, layout principles
- Microsoft PowerPoint: Master Slide, comment tools, companion tool, slide templates
- PDF files: creating files, Adobe Reader markup tools, Adobe Acrobat markup tools
- Media: media, word sounds, pronunciation guides, audio/video/photo editing
- Websites: HTML, CSS, XML, file sizes, single-source content

Try to limit a bullet point-format slide to no more than seven bullets, with relatively short entries under each bullet. Of course, you can actually use as many bullets as you want, but only if you follow the CRAP principles very well. (See Figure 10 for an example of a slide that contains ten bulleted points but is still readable.)

**How to Choose Good Colors**

Black-on-white presentations are easy to read, but they’re often very stark-looking, and your au-

![Figure 7. Cluttered infographic](image1)

![Figure 8. Uncluttered infographic](image2)

![Figure 9. Wall o’ Words](image3)

![Figure 10. Almost but not quite a “wall o’ words”](image4)
dience may not wish to stare at a bright white screen. Thus, you probably will want to use color in your presentation, and you need to choose your presentation’s colors carefully.

**Contrast.** Pick colors with high luminance contrast—in other words, one color should be much brighter than the other—so that your viewers will be able to read text quickly and with minimal eyestrain. Avoid extremely high color contrast, though, because extremes in color contrast can make text very hard to read. See Figure 11 for examples.

**Emotional Impact.** Also consider the emotional effect of colors that you choose. The “cool” colors (darker green, blue-green, light blue, dark blue, blue-violet, purple) are calm and soothing, while the “warm” colors (red-violet, red, red-orange, orange, yellow-orange, yellow, yellow-green) are stimulating. Choose colors that are appropriate for the subject and emotional impact of your presentation. See Figure 13 for an example.

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![Figure 11. Examples of color and luminance combinations](image)

**Figure 11.** Examples of color and luminance combinations

Similarly, you probably want to avoid pure white text on a black screen; it’s OK for special cases, but for an entire presentation, it’s overwhelming. See Figure 12.

**High Luminance Contrast #2**

[Image 12. White-on-black slide design]

Check out this slide—it has white text on a black background.

Look for about thirty seconds, then look away.

You can still see a blur, can’t you?

Would you want to look at this for ten minutes?

**Emotional Impact.** Also consider the emotional effect of colors that you choose. The “cool” colors (darker green, blue-green, light blue, dark blue, blue-violet, purple) are calm and soothing, while the “warm” colors (red-violet, red, red-orange, orange, yellow-orange, yellow, yellow-green) are stimulating. Choose colors that are appropriate for the subject and emotional impact of your presentation. See Figure 13 for an example.

![Figure 13. Emotional effects of colors](image)

**Figure 13.** Emotional effects of colors
How to Choose Appropriate Backgrounds

Always make your presentation’s background relate to its topic. PowerPoint, Prezi, and Keynote all allow you to choose from built-in or downloadable background “theme” templates, insert and customize solid colors, gradients, or patterns; or import your own image to use as a background for your presentation. You can use any of these options, but whatever option you choose, the background absolutely must mesh with the topic.

For example, if you are speaking about a computer-related subject, the “Organic” PowerPoint theme template would be a very poor choice. (See Figure 14.) It looks like a sheet of paper attached to a piece of wood by a ribbon, and its text uses a serif body font; there’s nothing about the template that suggests “computer technology.” The same theme template would look entirely appropriate for a food-related subject, though.

Also, consider whether the audience has seen the background before. There are only so many built-in theme templates, and chances are that your audience has seen the same background used for a different presentation or has used that same template themselves. In fact, if an event features multiple speakers, sometimes more than one presenter will use the same template, and the audience may get confused and not remember who said what. It is always a good idea to import your own image as a background or to customize templates to fit your needs. See Figure 15 for an example.

This brief YouTube video demonstrates PowerPoint's built-in slide designs and how to access and use its Format Background tool: https://www.dropbox.com/sh/812erramvb8iykj/AADoikR7jSHHOblwOKX1qCGa/PowertoPoint%20built-in%20backgrounds.mp4?dl=0

(As noted in the “How to Think About Layout” section, it would be a good idea to use the Master Slide tool when you customize backgrounds in order to make all the slides look uniform.)

Visual and Audio Effects

You can and should use between-slides transitions, within-slide animations, and sound effects, but don’t go overboard. Instead, use subtle effects, use them sparingly, and only use them to support your points.

Visual Effects. Transitions and animations can help you emphasize points, show connections between ideas, or simply capture your audience’s attention and prevent their eyes from glazing over. (See Figure 16 for a screenshot of the animations menu in PowerPoint 2013.)
Here is a link to a brief YouTube video demonstrating motion paths in Prezi: https://www.dropbox.com/sh/812erramvb81jy/AAC9SRhZy9v-CxNmAvQQtlf7a/Prezi%20sample.mp4?dl=0.

Sound Effects. Audio cues have the same potential benefits and drawbacks as transitions and animations, but they also have several unique problems of their own:

- Audio clips will sound distorted or tinny unless the computer you are using to present is connected to a good-quality sound system.
- If the audio clip is more than a few seconds long, you’ll need to shout to be heard over it.
- It’s almost impossible to talk over rock or hip-hop. Your voice just can’t compete with the backbeat.
- Music samples longer than a few seconds consume massive amounts of memory, and your file size will be huge.
- Song snippets may be so short that they’re unrecognizable.
- Nobody else likes your taste in music.

In short, no matter what program you use, keep your presentation’s visual and audio effects relatively simple and use them to support your message. The effects should enhance the presentation; they shouldn’t be the presentation.

Delivery Techniques

Your slideshow shouldn’t be the main focus of your talk. Instead, YOU and your message are the main focus, and the presentation should support your talk. Don’t hide behind the presentation or use it as a crutch.

Prepare Notes. Write down key phrases on notecards or, if you will have access to a speaker’s computer while you’re talking, the program’s Notes view. It’s not a good idea to write out a line-for-line script because if you read from a script, the presentation will sound stilted. The best
presentations are thoroughly prepared but sound ad-libbed. Whatever you do, DO NOT read every single word on the screen. Your audience members can read, and you'll only annoy them. See Figure 18 for an example.

Exercises

1. Find an short presentation (10 minutes or less) on YouTube, or another video hosting service, that deals with a topic you find interesting. After watching the presentation, evaluate it according to the information included in this article. What are the presentations strong points? Is it engaging and entertaining for the audience? What are its weak points? How might this presentation be improved?

2. Think about the next presentation that you will be asked to give in this course. (If you're not sure when that is, your instructor will clarify this information for you.) Now, analyze the rhetorical situation surrounding this presentation and decide which presentation format -- bulleted points, illustrated points, or speaker's prop -- would be most appropriate for your goals. Justify your choice.

Practice. Run through your talk and slideshow before you stand in front of an audience. Start up the presentation, say what you intend to say out loud, advance the presentation to match your speech, and time yourself. If you don't practice, your audience will know.

Face Your Audience. Turn your face toward the audience and make eye contact with them when you speak. If you do, the audience will be able to hear you, and they will be more likely to believe what you say.

Conclusion

When you create a PowerPoint, Prezi, or Keynote presentation, be sure to consider the principles discussed in this webtext. You now know how to:

• choose an effective presentation format
• identify readable typefaces
• position visual elements onscreen
• pick appropriate colors
• choose relevant, useful backgrounds
• choose effective visual and audio effects
• present memorable, effective audiovisual materials

and you can create a successful presentation that will both capture your audience's attention and provide the audience with clearly presented, easily-extracted information.
Appendix

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Annotated List of Useful Online Resources

By Amy Coughenour, Concordia University

<table>
<thead>
<tr>
<th>Learning Objective</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Develop information literacy strategies</td>
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</table>

These days, we're finding more and more information for free online. The following eight websites (or types of websites) are recommended for first-year undergraduate students. Most of the websites are broad-based and interdisciplinary, useful for searching any topic or subject. A few of the websites are subject-specific (such as health/medicine or controversial issues) or type-specific (such as primary sources or writing lab handouts). The following annotated list provides:

1. the names of the websites (and authors, if not the same as the publishers or providers),
2. the associated publishers or providers,
3. URLs to the homepages for the websites,
4. and summaries that describe the websites’ content and coverage as well as suggested research use.

All of these websites are free and open access.

The Bureau of Labor Statistics (BLS) focuses on “measuring labor market activity, working conditions, and price changes in the economy.” This is the place to go to research employment, occupational information, salary and benefits, and other labor-related information. Students researching careers will find a lot of information in the Occupational Outlook Handbook.

http://www.bls.gov/

The National Center for Educational Statistics (NCES) “collect[s] and analyz[es] data related to education in the U.S. and other nations.” It reports statistics and publishes reports from early childhood education all the way up to higher education. It also collects and publishes data about libraries. This is the place to go to research assessment scores, school programs, enrollment figures, tuition costs, financial aid, graduation rates, and other similar topics.

https://nces.ed.gov/

CIA World Factbook. Central Intelligence Agency.
“The World Factbook provides information on the history, people, government, economy, geography, communications, transportation, military, and transnational issues for 267 world entities.” It provides maps and flags for each country, along with detailed statistics in each of the main categories. For example, the “People and Society” category provides a variety of demographic statistics ranging from ethnic groups to languages to birth and
death rates. This is a good site for both foundational and statistical information at the broad, national level for countries around the world.  

Internet Archive. Internet Archive.
The Internet Archive is more than just an archive of web pages. (Even though looking up older versions of web pages can be a pretty cool thing!) It also includes “texts, audio, moving images, and software.” It is international in scope and offers “specialized services for adaptive reading and information access for the blind and other persons with disabilities.” This site would be a good place to check for media archives for video and music events. It’s also a good source for public domain works (i.e., works that are no longer in copyright). 
https://archive.org/index.php

National Archives and Records Administration. U.S. National Archives and Records Administration.
The National Archives holds a variety of records and other important documents as “the nation’s record keeper.” Many of these sources are digitized and available online. Even if the documents aren’t digitized, the National Archives provides records to tell you where you can locate or request a print copy. You can search the site for “documents, photos, and records,” or you can review educational material. This site is also the place to research military records. Because of the site’s emphasis on recording information of historical significance, it’s best used for historical or genealogical research.
http://www.archives.gov/

The National Institutes of Health (NIH) “is the nation’s medical research agency.” It’s actually “made up of 27 Institutes and Centers, each with a specific research agenda, often focusing on particular diseases or body systems.” Some of the institutes include the National Cancer Institute and the National Institute of Environmental Health Sciences, along with the National Library of Medicine. Each of these institutes manages a distinct site that provides information about the institute’s specialization in the forms of documents, pamphlets, training materials, consumer-focused data, and statistics. These sites would be good sources for locating information related to the biological sciences: biology, anatomy, disease, environment, aging, nursing research, etc.
http://www.nih.gov/

ProCon.org. ProCon.org.
ProCon.org is a non-profit site that focuses on covering both sides of controversial issues. It organizes topics according to subject, with some topics containing additional subtopics. Each argument includes citations and supporting documentation. In this way, students are able to use the site as both a brainstorming tool and a source of relevant articles and online sources.
http://www.procon.org/

Purdue University Writing Lab. Purdue Online Writing Lab [Purdue OWL]. Purdue University.
The Purdue Online Writing Lab [OWL] is one of the most well-known online writing labs. The site contains sections for writing (both general and subject-specific), research, and citation. It also provides detailed guides for writing and citing in both MLA and APA styles. This is a good site for students seeking more information about writing and citation styles, as well as the general mechanics of writing.
https://owl.purdue.edu/owl/

The Writing Center at UNC Chapel Hill. Handouts & Demos. College of Arts and Sciences, University of North Carolina at Chapel Hill.
Handouts & Demos is a collection of materials to help students with the writing process. The site is organized into four sections: “Writing the Paper,” “Citation, Style, and Sentence Level Concerns,” “Specific Writing Assignments/Contexts,” and “Writing for Specific Fields.” This is a good site for students needing more information about the mechanics and background of writing.
http://writingscenter.unc.edu/handouts/
Annotated List of Useful Library Databases
By Amy Coughenour, Concordia University

Learning Objective

• Develop information literacy strategies

While internet search engines have made locating sources online easier, there are still many digital sources beyond websites. Databases contract with publishers and other content providers to package access to articles, reports, conference proceedings, ebooks, films, images, and other material. Using databases and having access to such a variety of source material is an important part of the research process.

Search Engines vs. Databases vs. Catalogs

Most libraries provide links to different types of search systems, which contain the information, data, and search interfaces used to locate sources. The most common types of search systems are internet search engines, databases, and catalogs. They each search different types of information in different ways.

• How Databases and Search Engines Differ
  (http://www.library.illinois.edu/ugl/howdoi/compare1.html)
  Created by Undergraduate Library, University Library, University of Illinois at Urbana-Champaign.

• How Databases and Online Catalogs Differ
  (http://www.library.illinois.edu/ugl/howdoi/compare2.html)
  Created by Undergraduate Library, University Library, University of Illinois at Urbana-Champaign.

Libraries subscribe to databases to provide access to their users (students, faculty, staff, etc.), and because libraries subscribe to dozens (if not hundreds) of databases, it’s often helpful to evaluate both the database and the sources within the database. The following annotated list of databases helps with preliminary evaluation by describing the types of sources found within the databases. Some of the databases are broad-based, interdisciplinary systems that can be used to search any topic or subject. Other databases provide sources according to specific type (such as newspaper or video) or specific subjects (such as literature or science).

Most academic libraries should subscribe to these databases. Please be sure to check your library’s database aggregator or list of databases for availability and access.

Broad-Based Databases

Academic Search™ Complete. (http://www.ebscohost.com/academic/academic-search-complete)

Academic Search Complete™ is a multidisciplinary database that offers indexing and abstracts as well as full-text and scholarly sources. It also contains popular sources, such as magazines and newspapers. The variety of subjects includes “anthropology, astronomy, biology, chemistry, civil engineering, engineering, ethnic & multicultural studies, geology, law, materials science, mathematics, music, pharmaceutical sciences, physics, psychology, religion & theology, veterinary science, women’s studies, zoology, and many other fields.” This database works well for interdisciplinary searches as well as being a starting place for subject-specific searches.

JSTOR (http://www.jstor.org/)

JSTOR is a multidisciplinary database that offers indexing and abstracts as well as full-text and scholarly sources. It also contains books and primary sources. The database offers both the usual search options along with a subject browse tool for the following areas: area studies, arts, business and economics, history, humanities, law, medicine and allied health, science and mathematics, and social sciences. This database works well for interdisciplinary searches, but may be better for students with more experience searching databases. For example, it has a more unique search interface that does not allow for subject heading (also known as subject term) searches. However, it contains high-quality sources that are worth the effort of searching.


ProQuest Research Library™ is a multidisciplinary database that offers indexing and abstracts as well as full-text and scholarly sources. It also contains popular sources, such as magazines and newspapers. Specific subjects range from business to education to humanities to sciences, plus many more. This database supports interdisciplinary searches while still providing a good starting point for subject-specific searches. (ProQuest developed a LibGuide tutorial for this database, which is located here (http://proquest.libguides.com/pqrl)).

Web of Science®. (http://thomsonreuters.com/products_services/science/science_products/a-z/web_of_science/)

Web of Science® is a multidisciplinary database that offers indexing and abstracts for sources. It offers links to full-text availability from other sources—either directly from the publishers (at cost) or through a library’s OpenURL connector (http://encyclopedia2.thefreedictionary.com/OpenURL) to other databases. The database’s interdisciplinary nature comes from the combination of its indexes: Science Citation Index Expanded®, Social Sciences Citation Index®, Arts & Humanities Citation Index®, Conference Proceedings Citation Index, Index Chemicus®, and Current Chemical Reactions®. It also integrates EndNote Web® for managing articles and references online. This database works well for interdisciplinary searches as well as citation mapping, which is a form of search that locates articles based on their citations in other articles.

Source Type Databases

ARTstor Digital Library. (http://www.artstor.org/what-is-artstor/w-html/artstor-overview.shtml)

The ARTstor Digital Library is a nonprofit resource that provides more than one million digital images in the arts, architecture, humanities, and sciences with an accessible suite of software tools for teaching and research.” It allows users to search for, view, and download images related to a variety of topics, such as: art, architecture, religion, anthropology, history, and literature. The database also provides image credit information for
properly citing the images. Students can use these images in papers, presentations, and other assignments.

CQ Researcher. (http://www.cqpress.com/researcher)
CQ Researcher is a topics-focused database that “covers a wide range of social, economic, political, and environmental issues.” The database’s standardized reports review current events as researched by journalists. The reports include twelve sections, many of which are: an overview, background, outlook, pro/con, and bibliography. Students will be able to use these reports to research current events and controversial issues. The reports also provide broad background information to aid students in developing the foundations for their research.

Films on Demand. (http://ffilms.com/digitallanding.aspx)
Films on Demand is a database of streaming videos. It includes both a search function and browsing ability by subject and collection. The collections come from a variety of well-known film production companies, such as the BBC, PBS, and other news organizations, as well as National Geographic and TED. Subject browsing begins with broad categories, such as biology and political science, and narrows down to more specific subtopics, such as genetics and political institutions. This database is a good option for visual learners and researchers who want a broad range of source types. The videos can be embedded into presentations, and many videos include transcripts and closed captioning, which helps for quoting material.

ProQuest Newsstand™ focuses on news sources, including newspapers and wire services. It offers indexing, abstracts, and full-text availability. Its newspaper coverage “includes international, national and regional papers.” This database would be useful for researching current events or opinions, such as controversial topics. It also assists with historical, human interest, and genealogical searches.

Subject-Specific Databases
ABI/INFORM® is a business research database that provides indexing and abstracts, full text, images, and graphics. Sources include articles from journals and conference proceedings, pocket reports, business news, business case studies, and dissertations. This would be a good database choice for students researching topics in business, economics, corporate strategies, management, business trends, accounting, finance, etc.

ACM Digital Library. (http://dl.acm.org/)
The ACM Digital Library focuses on computing, computer systems, and related subjects. The database contains “full text of every article ever published by ACM and bibliographic citations from major publishers in computing.” This means that it is both an indexing and abstracting database (for non-ACM publishers) and a full-text database (for ACM-published sources). Sources include articles, conference proceedings, books, interviews, and other sources. Students should be able to locate sources to support research involving information technology, computers, software, computer and/or software engineering, programming, technical communication, telecommunications, and other related fields.

History Reference Center®. (http://www.ebscohost.com/us-high-schools/history-reference-center)
History Reference Center® is a history research database. It is created specifically for researchers ranging from high school students to undergraduates. Sources include reference materials, biographies, documents, photos, maps, videos, and scholarly articles. Students should be able to locate sources to support research involving historical events, specific time periods, figures, military history, and other related historical topics.

IEEE Xplore® is a subject-specific database for “scientific and technical content published by the IEEE (Institute of Electrical and Electronics Engineers) and its publishing partners.” Sources include journals, conference proceedings, reports, standards, and electronic books. Students should be able to locate sources to support research involving engineering, computer science, electronics, and related fields. For a better idea of the range of related fields, review the IEEE Society Memberships (http://www.ieee.org/membership_services/membership/societies/index.html) page, which includes: IEEE Broadcast Technology Society (http://bts.ieee.org/), IEEE Education Society (http://www.ewh.ieee.org/soc/ese/), IEEE Oceanic Engineering Society (http://www.oceanicengineering.org), IEEE Professional Communications Society (http://pcs.ieee.org/), etc. All of these groups have publications included in the database.

Literature Resource Center. (http://gdc.gale.com/gale-literature-collections/literature-resource-center)
Literature Resource Center is a subject-specific database for literature, literary criticism, and the humanities. It offers a variety of types of searches for both specific works and authors. Sources include critical essays, interviews, reviews, and other scholarly articles. This database would be a good choice for students researching literature, literary theory, poetry, and drama.

MathSciNet®. (http://www.ams.org/mathscinet/)
MathSciNet® is a mathematical literature review database. It includes literature reviews along with abstracts, indexing, and links to articles. This database would be most useful for students researching the mathematical sciences: algebra, trigonometry, geometry, calculus, etc.

PsycINFO® is a subject-specific database that focuses on behavioral sciences and mental health studies (such as psychology, neuroscience, social work, medicine, nursing, etc.) along with related fields (such as forensics, business, engineering, etc.). It is an indexing and abstracting database that also provides either links to full text or the actual full text, depending on the platform. (The database is available from several vendors, including the APA, EBSCO, and ProQuest.) This database would be a good source for students studying behaviors, social sciences, psychology, medicine, and related fields.
**ScienceDirect** ([http://www.sciencedirect.com/](http://www.sciencedirect.com/))

*ScienceDirect* is a science and technology database that provides indexing and abstracts along with full-text access to journal articles and book chapters published by Elsevier and its imprints ([http://www.ehow.com/facts_7343502_publishing-imprint.html](http://www.ehow.com/facts_7343502_publishing-imprint.html)). It carries very few third-party sources. The majority of the information contained in the database focuses on the sciences—physical sciences and engineering (such as chemistry, computer science, engineering, mathematics), life sciences (such as agriculture, biology, neuroscience), and health sciences (medicine, pharmacology, nursing, veterinary science). It also includes some articles from related fields in the social sciences and humanities, but in general, it’s not a social science or humanities database. Students should be able to locate sources in the sciences, technical fields, and related subjects.

**FURTHER READING**

Please view these links for related search, database, and library information:

Annotated List of Useful Professional and Technical Communication Sources

By Rachel Tanski, University of South Florida

<table>
<thead>
<tr>
<th>Learning Objective</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Develop information literacy strategies</td>
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</table>

Journals

Now that you are familiar with some generally useful library and internet resources, it’s also helpful to be familiar with some important journals in the field of professional and technical communication. It is important to know the top publications in your field so that you can keep up to date with current and emerging research and trends. This kind of knowledge reflects your professional development and can advance your career by demonstrating to employers that you participate in the progress of your field. Your work itself will also be top-notch when you are aware of the most recent developments in your profession. While I have provided the website for each source, in many cases, you will have access to them through your university library’s databases (the library website lists all available journals) and do not have to pay for an individual subscription to access them.

*Technical Communication Quarterly* is published by the Association of Teachers of Technical Writing (ATTW), an organization of academic and professional technical communicators. The journal combines theory and practice to promote “accessible” research in many technical communication contexts, including government, business, science, and academia.

http://www.attw.org/publications/tcq

*IEEE Transactions on Professional Communication* is published quarterly by the Institute of Electrical and Electronics Engineers (IEEE) professional communication society. Its audience is a combination of engineers, most of whom are members of the organization, and academics. Because of its hybrid audience, Transactions articles focus on the practical implications of their studies, whether in teaching, technology, or communication.

http://pcs.ieee.org/transactions-of-professional-communication/

*Technical Communication* is published quarterly by the Society for Technical Communication. Like TCQ and Transactions, it combines theory and research with suggestions for practical implementation. According to its website, book reviews are among its most popular features. This can be helpful in familiarizing yourself with recent book publications in the field.

http://stc.org/publications/technical-communication

*The Journal of Technical Writing and Communication* is a professional and scholarly journal that “performs as the needed bridge between academia and the world of practitioners.” It covers various writing and communication contexts, including government, academia, and professional settings.

http://baywood.com/journals/PreviewJournals.asp?Id=0047-2816
The Journal of Business and Technical Communication provides current research about the latest trends, problems, and practices in professional and technical communication. It offers scholarly articles, reviews, practical applications, opinion pieces, and dialogues between authors and readers as a comprehensive study of key communication issues. Like the other journals, it is multidisciplinary and serves a diverse audience of academics, scientists, and other professional communicators.
http://www.sagepub.com/journalsProdDesc.nav?prodId=Journal200791

APA Style

You now have resources for conducting research, but you will also need resources for citing that research. You should always cite your sources to give proper credit to the authors and to enhance your own credibility as a student and researcher. Showing that you have done the necessary research and can recognize valid sources will make others more likely to want to read your work. Therefore, it is important to cite your sources according to accepted guidelines. Most professional and technical communication documents require references in APA Style. Regulated by the American Psychological Association, APA Style is one of several popular citation styles (others include MLA, Chicago/Turabian, and IEEE). While it is tempting to simply plug your source's publication information into an online citation generator, these websites often produce incorrect results. It is best to write your citation manually using a style guide. Here are the most reliable online APA Style guides:

The American Psychology Association provides an APA Style Guide on its website. It includes basic descriptions of standard formatting and citation. It also offers teaching and learning guides and sells products like hard copy guides.
http://www.apastyle.org/index.aspx?

Outside of the organization itself, the Online Writing Lab (OWL) at Purdue University provides an APA Style guide, as well as MLA and Chicago style guides. It provides other useful writing tools, like sample documents and a list of other genres, including a section specific to professional and technical writing.
https://owl.english.purdue.edu/owl/

You probably already have experience conducting research for school projects, and you will continue to use these skills in your career. When composing a professional document, you may need to conduct research and follow a certain design and/or citation style. It is important to develop good research skills now, as you prepare to enter your professional careers.
Author Bios

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Dr. Wilma Davidson, in addition to being an instructor of Professional and Technical Communication at the University of South Florida Sarasota-Manatee, is president of Davidson & Associates, a communications consulting firm. She works with a wide range of Fortune 500 companies to overcome the written and oral communication challenges confronting them. Additionally, she has authored several books on the art of communicating, including Business Writing: What Works, What Won’t.

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Lee Ann Hodges is the chair of the English Department at Tri-County Community College in Murphy, North Carolina. She teaches composition, professional writing, and British literature, both online and in the traditional classroom. Her background also includes journalism and development education.

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Dr. Joseph Moxley is the founder, publisher and CEO for Writing Commons. A professor of English and Director of Composition at the University of South Florida, Moxley has published books, articles, and chapters on a variety of topics, including creative writing pedagogy; qualitative research methodologies; digital libraries; learning communities, scholarly publishing, and ETDs (electronic theses or dissertations).

Dr. Laura Palmer is an Associate Professor and Chair of the Digital Writing and Media Arts department at Kennesaw State University, Kennesaw, GA. Her research interests center on the emerging roles for technical communicators in social media.

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Joe Schall was the Giles Writer-in-Residence for the College of Earth and Mineral Sciences at Penn State from 1988 until 2008. He has won numerous honors for his writing and teaching, including the Bobst Award for Emerging Writers from New York University and the Wilson Award for Outstanding Teaching from Penn State’s College of Earth and Mineral Sciences. He is currently a Health Communications Specialist for the National Institute for Occupational Safety and Health.

Dr. Julie Staggers is an associate professor in the Department of English at the University of South Florida. Her research appears in journals such as IEEE: Transactions on Professional Communication, Journal of Technical Writing and Communication, Business Communication Quarterly, and College English. She is the author of Rhetoric, Risk and Secrecy in the Atomic City (forthcoming, Ashgate), a study of the secrecy culture in the workplace and company town attached to the Manhattan Project plutonium plant at Hanford, Washington. Dr. Staggers joined the faculty of USF in August 2013 as the Director of the undergraduate major in Professional Writing, Rhetoric and Technology. She teaches graduate and undergraduate courses in professional and technical writing, visual rhetoric, and the rhetoric of technology.

Dr. Kyle D. Stedman is an Assistant Professor of English at Rockford College, where he teaches courses in writing and rhetoric. His work explores sonic rhetorics, intellectual property, and fan studies. His publications have appeared in Computers and Composition, Currents in Electronic Literacy, and the Writing Spaces series of textbooks, and his coauthored book for NCTE, Agency in the Age of Peer Production, was released in Summer 2012.

Rachel Tanski is a PhD student in Literature at the University of South Florida. She received her BA and MA in English from Seton Hall University. Her research in literature focuses on medieval religious writing, but she has recently developed an interest in Professional and Technical Communication pedagogy. She currently teaches composition and technical writing at USF.

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