STUDY NOTE (BLACKBORAD-SECOND SEMSETER 2015/2016

Week 2 Study Notes
Introduction
Technical communication, perhaps more than any other type of communication, must be accurate. Technical communication, regardless of the value of its content and presentation, loses all credibility if it contains errors at the expression level. For instance, the grammar must be correct, whether the expression medium is oral, written or visual or some combination of these or the structural mode formal or informal. In a written medium, spelling and writing must also be correct. In an oral communication tone of voice, clarity of enunciation and speed of delivery must be as near perfect as possible. As a step towards helping you understand where you are in your expression skills, you will complete a grammar diagnostic test as an assignment in the first module. While this diagnostic is focused on grammar in a written form, it is very important to remember that grammar is equally as important when expressing through oral means.

As the course progresses, there will be an expectation that all of your work, whether in oral, written or visual form, will be completely free of grammatical and mechanical errors. The grading rubrics that accompany each assignment will reinforce the importance of expression accuracy at this level of abstraction in each assignment.

Study Notes

1.1 What is Technical Communication *not* about?
Technical communication, or technical writing, is not writing about a specific technical topic such as computers.

The term "technical" refers to knowledge that is not widespread; knowledge that is more the territory of experts and specialists in a given field. For instance, carpentry has its specific technical knowledge, human hair care as well is backed by a body of technical knowledge. Whatever your major is, you are developing an expertise — you are becoming a specialist in a particular technical area.

Whenever you try to write or say anything about your field, you are engaged in technical communication.

1.2 Purpose and Audience
Another critical aspect of technical communication is purpose and awareness. You should never begin to create any technical communication until you know the *purpose* and *audience* for your work. This is even true when stopped by your boss's boss and asked to give a brief explanation of some aspect of a deliverable for which you are responsible. Time frame available for considering these two elements, purpose and audience is very tight in such a situation, but it is still important to consider them before creating the oral response -- that is, talking about that deliverable to your boss' boss. Creating a technical communication artifact without determining audience and purpose is like starting on a difficult journey without a map or any knowledge of your final destination. In fact, this audience element is so important that it is one of the

cornerstones of this course: you are challenged to write and speak about highly technical subjects but in a way that a beginner — a non-specialist — could understand.

This ability to "translate" technical information to non-specialists is a key skill for any technical communicator to possess. In a world of rapid technological development, people are always falling behind and becoming technological illiterates. Technology companies are constantly struggling to find effective ways to help customers or potential customers understand the advantages and/or the operation of their new products. It is up to those who are in fact staying up with the changes to communicate the significance of those changes to those who are not keeping up, in order to maintain a focus of competing successfully in the marketplace.

Once you have defined these two basic elements, purpose and audience, for a specific work of technical communication, you will need to analyze and clarify each before making a decision on what to say and how to say it. For example, when writing a memo or participating in a meeting concerning a high-tech local area network (LAN) purchase, would you make the request to the networking manager in the same way as you would to the chief financial officer? What if both of these people were going to be in the meeting room together? What do you do in that situation? We won't answer those questions here, but as you progress through the course, your ability to deal with diverse, ever-changing communication situations will grow. For now, remember that knowing your audience and focusing on your purpose usually carries equal weight when designing a technical communication. Letting one or both elements slide can reduce the effectiveness and clarity of your expression effort and can make the difference between a successful outcome and a botched job.

1.3 Documenting Processes and Instructions

You will learn about process documentation in this module. Process documentation is different from instruction documentation in both its form and function.

In simple terms, **process documentation** explains how something happens, the flow of the activities and any data, information or knowledge transfers, whereas **instruction documentation** (sets of instructions) describe how to complete a specific task.

In this module you will create a set of instructions using a *step-action table*. A step-action table is a very basic device used to structure and display ordered instructions. The step-action table assignment will both reinforce the principles of effective document design and encourage you to use many of the layout and design features of a word processor.

Once the first draft of your instruction set is completed, have someone try to follow your instructions. Doing so is considered basic *end-user documentation testing*, but you may be surprised at the feedback you get. Something that seems very straightforward to you may be confusing to your user, especially if the process is one with which you are very familiar. When we are familiar with a task, we tend to internalize it to the point that we skip steps or over-simplify directions that are, in reality, quite complex.

1.4 The Seven Characteristics of Effective Technical Communication

While every instance of technical expression is different, there are several measures of quality that characterize all technical communication output, whether in an oral, written or visual form or some combination of the three modes. These include:

- Honesty
- Clarity
- Accuracy
- Comprehensiveness
- Accessibility
- Conciseness
- Professional appearance

1.5 Fundamentals of document design
Effective Document Design

A document has been well designed if it allows the reader to recognize a pattern (where certain kinds of information can be located). How do you achieve this?

According to learning theory, readers find information much more accessible if you visual patterns are present that help readers locate, comprehend, and retain information. These three techniques will assist you in creating these visual patterns:

- Chunking
- Queuing
- Filtering

Chunking

Chunking is splitting information into small, "bite-size" pieces, rather than providing it all at once. Compare these two writing samples. Which one would you rather read?

Non-chunked text

The final purpose of the course, enjoying the experience, "wraps" the other purposes together. "Tremendous power exists in the fact of continued improvement and the delivery of results. Point to tangible accomplishments — however incremental at first — and show how these steps fit into the context of an overall concept that will work. When you do this in such a way that people see and feel the buildup of momentum, they will line up with enthusiasm" (Collins, 2001). Enjoyment has a direct relationship to accomplishment. Plans that can be measured bring happiness to the people accomplishing the plan (Good to Great). What are the competencies of a Manager? The objective of Process Management Applications is to build the competencies of the participants. These competencies are: Flexibility — Adapts to change in the work environment; effectively copes with stress and change. Leadership — Demonstrates and encourages high standards of behavior; adapts leadership style to situation and people. Influencing and Negotiating — Provides information to key groups and individuals; uses negotiation and persuasion in dealing with others to achieve goals. Planning — Establishes plans and priorities with coordination of others. Decisiveness — Takes action and risks when needed; makes difficult decisions when necessary. Interpersonal Skills — Considers and responds to the needs, feelings, capabilities, and interests of others. Problem Solving — Analyzes relevant information and encourages alternate solutions and plans to solve problems. Creative Thinking — Develops insights and solutions; fosters innovation.

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Queuing uses visual breaks (in material that has a logical link) to create levels of importance within that material. This is the visual equivalent of the traditional essay outline where Roman numerals are used to indicate points and sub-points:

For example:

Musical Scales are the building blocks of Western Music. They can be divided into two types of scales, Major and Minor Scales.

1. Major Scales consist of two whole tones followed by a half tone followed by three more whole tones and a half tone.
1. An example would be C major which has no sharp or flats.
2. Another example would be F major which has a B^b.
2. Minor Scales consist of one whole tone followed by a half tone followed by two whole tones, followed by a semitone and finally two whole tones.
1. An example would be A minor which has an G#.
2. Another example would be A harmonic minor.
1. Harmonic and melodic minors are variants of the minor key.

Filtering

Filtering distinguishes text by dividing it on the page, using the same font styles for particular information and using graphics or logos to identify information (a stop sign to indicate critical information, for example). See the following user guide as an example of a text that uses filtering to assist its audience.

[Filtering example](#)

1.5.1 Other Elements of Effective Page Layout

Your textbook provides a great deal of information on the use of white space. Familiarize yourself with the correct way to lay out your page, and how to use graphics, tables, and figures in a document. Following these guidelines will make your document look more professional and make it easier for your audience to find the information that they need.

Dressing up your Document

Making sure your documents look professional adds credibility to what you have to say. In fact, it is not much different from dressing appropriately for an interview or a first client meeting. Either way, you have one chance to make a good first impression. When writing technical documents, you may need to "dress it up" using the right design elements.

How you dress up a document will of course depend upon the situation and audience. If you are writing an e-mail or quick memo, then you may reduce or eliminate the visuals and graphic elements. When writing a more elaborate report for a client, you will want to make sure it has been built on a solid visual and professional foundation.

Document Design

Earlier in this course it was suggested that it was not a good idea to leap into writing the document but to create a plan based on an outline. It is worth repeating that the creation of an outline can give you a framework to follow for your document creation and construction. Good writers first develop outlines to provide them with a quick view of concepts and their relation to one another. An outline can help establish priorities and make the document flow smoothly and logically.

The outline is a way to help break up your ideas into logical chunks of information because most individuals need to process smaller units of technical data. Visually, you can achieve this using some basic rules that can help your readers:

- How often do you open a piece of junk mail or a more credible document and view a "wall of text"? Does this make you want to read the information? Most of us will naturally look for a way to grasp the information quickly. When that doesn't work we often decide to just put it down and ignore it.
- You should always create a document that provides an easy entry for your readers using white space, headings, and lists of important information. If you can design recognizable patterns or paths within the text to help your readers grasp the information, then you have made everyone's job easier.

10 seconds . . . 30 seconds and the Detailed Reader

Some individuals in your target group will have more time to read your document than others. Most executives look for "just the facts" without wanting to engage in a long discourse. Depending upon your audience, you must be sensitive to their time constraints. While the

information may be of interest to all parties (especially you), just how much time will a reader be willing to devote to a 20-page treatise on the implications and cost of a new wireless network? Don't assume you will always get your reader's undivided attention.

Often, your audience may not be so narrow in scope. How do you write for the vice president of marketing and the chief financial officer at the same time? The best way is to maintain some flexibility in your document design and make sure you write for the 10-second, the 30-second, and the more committed reader.

If you make your information easy to find, then when readers put down your document, they will find it easy to pick it up and read more of your material. Don't assume everyone will digest your document in one sitting. Make sure your main points can be quickly seen and understood by a busy reader who glances at it even if it is for only a few seconds.

Other Design Considerations

Good document design should include the queues necessary for your readers to easily find what they want or to pick up where they left off. This can be achieved using good typography, proper amounts of white space, bullets, numbered lists, headings, subheadings, tables, charts, and visual patterns. Organizing the right elements on the page incorporates the rules of page design along with the concepts of a much broader area of study called learning theory.

What works on a document may not work so well on a computer screen. Too much text on a Web site may work better on paper. A detailed graphic on paper may look fine, but it could take an inordinate amount of time to access on a Web site. This course will help you understand the differences between traditional linear documents and non-linear Web pages.

Graphics and Design

While this is not a course on graphic design, it is important for non-design majors to become familiar with the essential rules of graphic design.

Graphics are the pictures you use in technical communication and other media. These can include:

Drawings
- Maps
- Photographs
- Diagrams
- Charts
- Graphs
- Tables

Graphics are important in communicating technical information that cannot always be effectively put into words. You will learn how to effectively incorporate graphics into your document or Web pages using some elements and principles of design as described below.

- **Shape** – Shape refers to the general outline of an object. The lines bordering the design describe and make up a shape. The shape defines the space.
- **Balance** – Balance refers to the equal distribution of weight among the objects on the page. When a design is balanced, it holds together and is more comfortable to view. The visual factors that relate to balance include weight, position, and the arrangement of the objects (both words and graphics) on the page.

- **Rhythm & Unity** – Rhythm is a pattern that is created by repeating or varying elements within the document, with consideration given to the space between them. Rhythm establishes a sense of movement from one object to the next. Rhythm can be created by unity, which is the organization of elements in a design whose elements look as though they belong together. The visual unity of the whole design is referred to as the Gestalt.
- **Visual Hierarchy** – Visual hierarchy places a point of emphasis, or the focal point, on the main subject. The two types are:
  - Focal point–where on the page you want the viewer to look first.
  - Accents–the elements that back up the focal point.
- **Figure/Ground** Figure and ground refer to the page (ground or background) and the objects (figures) on the page. Figure and ground are also referred to as positive and negative space. Positive space is the dominant space made by the figure. Negative space is the space around the positive space. A common term used in design is figure/ground relationship, which means how the figure relates in space to its background.
- **Dominant/Subdominant/Subordinate** Dominant, subdominant, and subordinate objects are the hierarchy of objects that are seen by the reader.
  - Dominant – the object that takes up the most focal room. This can be achieved by size, color, relationship, texture, etc. The viewer should see the dominant object first.
  - Subdominant – the object that is second in command. The viewer should be led to this object after the dominant object.
  - Subordinate – the smallest object on the page. The viewer should see the subordinate object last.
- **Tension** – Tension refers to the emphasis placed on one area that causes uneasiness at another area. Tension is sometimes achieved by squeezing letters together or by putting opposing shapes close together.
- **Flow** – Flow describes when objects are arranged in a design so that the viewer's eyes are led from one element to another. Flow is one way to force the viewer to look at objects in a specific order. The order is usually from left to right or from the largest to smallest object (although this bias is particular only to some cultures, including the U.S.).
- **Color** – Color is the characteristic of the design that is caused by differing qualities of the light reflected or emitted by them. Color characteristics can be divided into three aspects*:
  - Hue – synonymous with your concept of color.
  - Saturation – the intensity or the saturation of a color. The greyer or more neutral a color is the less saturation it has.
  - Value – the lightness or darkness of a color. Lightened values are called tints and darkened values are known as shades.
  - *HSV (hue, saturation, value) is also often referred to as HSB (hue, saturation, and brightness).
- **Characteristics of Effective Graphics -** To be effective, a graphic must be understandable and meaningful with the larger narrative in your document or Web design. There are several guidelines that can help make your graphics more effective.
  - All graphics should have purpose. Make sure that your image can help the reader attain and retain the information. Avoid using meaningless or poorly chosen images or clip art.

- A graphic should display truthful information. Graphics, like text, can convey dishonest information. As the author, you are responsible for making sure that all the elements of your document are honest and truthful in nature.
- A graphic should be simple. This is not always easy, given the complexities of the technical data being displayed.
- Each graphic should present a manageable amount of information. Presenting too much information to your readers runs the risk you may confuse and ultimately lose your readers. You will need to refer back to your audience and their expectations. What kinds of graphics is your audience comfortable with? Are they familiar with the topic? Are the technical issues too difficult for some of your readers?
- Graphics should meet a reader's expectations of convention. This module will help you understand some of the graphical conventions that all of us experience as readers of documents and Web sites. When you follow the conventions (e.g., putting a title on the top of a page), your reader will expect to know where to find it.
- Every graphic should be clearly labeled with captions or headings. Except for a brief or informal communiqué, make sure that all graphics you incorporate into your document have a title that is clearly labeled and informs the reader.
- Graphics also should have captions (for those who are scanning the document rather than reading the document to use the information within it). If the graphic is referred to in the text, the label should be used instead of a proximity term such as "below" or "above."

Week 3 Study Notes
Introduction
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1.3 Documenting Processes and Instructions

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In simple terms, **process documentation** explains how something happens, the flow of the activities and any data, information or knowledge transfers, whereas **instruction documentation** (sets of instructions) describe how to complete a specific task.

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1.4 The Seven Characteristics of Effective Technical Communication

While every instance of technical expression is different, there are several measures of quality that characterize all technical communication output, whether in an oral, written or visual form or some combination of the three modes. These include:

- Honesty
- Clarity
- Accuracy
- Comprehensiveness
- Accessibility
- Conciseness
- Professional appearance

1.5 Fundamentals of document design
Effective Document Design

A document has been well designed if it allows the reader to recognize a pattern (where certain kinds of information can be located). How do you achieve this?

According to learning theory, readers find information much more accessible if you visual patterns are present that help readers locate, comprehend, and retain information. These three techniques will assist you in creating these visual patterns:

- Chunking
- Queuing
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Non-chunked text

The final purpose of the course, enjoying the experience, "wraps" the other purposes together. "Tremendous power exists in the fact of continued improvement and the delivery of results. Point to tangible accomplishments — however incremental at first — and show how these steps fit into the context of an overall concept that will work. When you do this in such a way that people see and feel the buildup of momentum, they will line up with enthusiasm" (Collins, 2001). Enjoyment has a direct relationship to accomplishment. Plans that can be measured bring happiness to the people accomplishing the plan (Good to Great). What are the competencies of a Manager? The objective of Process Management Applications is to build the competencies of the participants. These competencies are: Flexibility — Adapts to change in the work environment; effectively copes with stress and change. Leadership — Demonstrates and encourages high standards of behavior; adapts leadership style to situation and people. Influencing and Negotiating — Provides information to key groups and individuals; uses negotiation and persuasion in dealing with others to achieve goals. Planning — Establishes plans and priorities with coordination of others. Decisiveness — Takes action and risks when needed; makes difficult decisions when necessary. Interpersonal Skills — Considers and responds to the needs, feelings, capabilities, and interests of others. Problem Solving — Analyzes relevant information and encourages alternate solutions and plans to solve problems. Creative Thinking — Develops insights and solutions; fosters innovation.

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Queuing

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For example:

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- **Shape** – Shape refers to the general outline of an object. The lines bordering the design describe and make up a shape. The shape defines the space.
- **Balance** – Balance refers to the equal distribution of weight among the objects on the page. When a design is balanced, it holds together and is more comfortable to view. The visual factors that relate to balance include weight, position, and the arrangement of the objects (both words and graphics) on the page.
- **Rhythm & Unity** – Rhythm is a pattern that is created by repeating or varying elements within the document, with consideration given to the space between them. Rhythm establishes a sense of movement from one object to the next. Rhythm can be created by unity, which is the organization of elements in a design whose elements look as though they belong together. The visual unity of the whole design is referred to as the Gestalt.
- **Visual Hierarchy** – Visual hierarchy places a point of emphasis, or the focal point, on the main subject. The two types are:
- o Focal point–where on the page you want the viewer to look first.
- o Accents–the elements that back up the focal point.
- **Figure/Ground** Figure and ground refer to the page (ground or background) and the objects (figures) on the page. Figure and ground are also referred to as positive and negative space. Positive space is the dominant space made by the figure. Negative space is the space around the positive space. A common term used in design is figure/ground relationship, which means how the figure relates in space to its background.

- **Dominant/Subdominant/Subordinate** Dominant, subdominant, and subordinate objects are the hierarchy of objects that are seen by the reader.
- Dominant – the object that takes up the most focal room. This can be achieved by size, color, relationship, texture, etc. The viewer should see the dominant object first.
- Subdominant – the object that is second in command. The viewer should be led to this object after the dominant object.
- Subordinate – the smallest object on the page. The viewer should see the subordinate object last.
- **Tension** – Tension refers to the emphasis placed on one area that causes uneasiness at another area. Tension is sometimes achieved by squeezing letters together or by putting opposing shapes close together.
- **Flow** – Flow describes when objects are arranged in a design so that the viewer's eyes are led from one element to another. Flow is one way to force the viewer to look at objects in a specific order. The order is usually from left to right or from the largest to smallest object (although this bias is particular only to some cultures, including the U.S.).
- **Color** – Color is the characteristic of the design that is caused by differing qualities of the light reflected or emitted by them. Color characteristics can be divided into three aspects*:
- Hue – synonymous with your concept of color.
- Saturation – the intensity or the saturation of a color. The greyer or more neutral a color is the less saturation it has.
- Value – the lightness or darkness of a color. Lightened values are called tints and darkened values are known as shades.
- *HSV (hue, saturation, value) is also often referred to as HSB (hue, saturation, and brightness).
- **Characteristics of Effective Graphics -** To be effective, a graphic must be understandable and meaningful with the larger narrative in your document or Web design. There are several guidelines that can help make your graphics more effective.
- All graphics should have purpose. Make sure that your image can help the reader attain and retain the information. Avoid using meaningless or poorly chosen images or clip art.
- A graphic should display truthful information. Graphics, like text, can convey dishonest information. As the author, you are responsible for making sure that all the elements of your document are honest and truthful in nature.
- A graphic should be simple. This is not always easy, given the complexities of the technical data being displayed.
- Each graphic should present a manageable amount of information. Presenting too much information to your readers runs the risk you may confuse and ultimately lose your readers. You will need to refer back to your audience and their expectations. What kinds of graphics is your audience comfortable with? Are they familiar with the topic? Are the technical issues too difficult for some of your readers?
- Graphics should meet a reader's expectations of convention. This module will help you understand some of the graphical conventions that all of us experience as readers of documents and Web sites. When you follow the conventions (e.g., putting a title on the top of a page), your reader will expect to know where to find it.

- Every graphic should be clearly labeled with captions or headings. Except for a brief or informal communiqué, make sure that all graphics you incorporate into your document have a title that is clearly labeled and informs the reader.
- Graphics also should have captions (for those who are scanning the document rather than reading the document to use the information within it). If the graphic is referred to in the text, the label should be used instead of a proximity term such as "below" or "above."

Week 4 Study Notes
Introduction
Technical communication, perhaps more than any other type of communication, must be accurate. Technical communication, regardless of the value of its content and presentation, loses all credibility if it contains errors at the expression level. For instance, the grammar must be correct, whether the expression medium is oral, written or visual or some combination of these or the structural mode formal or informal. In a written medium, spelling and writing must also be correct. In an oral communication tone of voice, clarity of enunciation and speed of delivery must be as near perfect as possible. As a step towards helping you understand where you are in your expression skills, you will complete a grammar diagnostic test as an assignment in the first module. While this diagnostic is focused on grammar in a written form, it is very important to remember that grammar is equally as important when expressing through oral means.

As the course progresses, there will be an expectation that all of your work, whether in oral, written or visual form, will be completely free of grammatical and mechanical errors. The grading rubrics that accompany each assignment will reinforce the importance of expression accuracy at this level of abstraction in each assignment.

Study Notes

1.1 What is Technical Communication *not* about?
Technical communication, or technical writing, is not writing about a specific technical topic such as computers.

The term "technical" refers to knowledge that is not widespread; knowledge that is more the territory of experts and specialists in a given field. For instance, carpentry has its specific technical knowledge, human hair care as well is backed by a body of technical knowledge. Whatever your major is, you are developing an expertise — you are becoming a specialist in a particular technical area.

Whenever you try to write or say anything about your field, you are engaged in technical communication.

1.2 Purpose and Audience
Another critical aspect of technical communication is purpose and awareness. You should never begin to create any technical communication until you know the *purpose* and *audience* for your work. This is even true when stopped by your boss's boss and asked to give a brief explanation

of some aspect of a deliverable for which you are responsible. Time frame available for considering these two elements, purpose and audience is very tight in such a situation, but it is still important to consider them before creating the oral response -- that is, talking about that deliverable to your boss' boss. Creating a technical communication artifact without determining audience and purpose is like starting on a difficult journey without a map or any knowledge of your final destination. In fact, this audience element is so important that it is one of the cornerstones of this course: you are challenged to write and speak about highly technical subjects but in a way that a beginner — a non-specialist — could understand.

This ability to "translate" technical information to non-specialists is a key skill for any technical communicator to possess. In a world of rapid technological development, people are always falling behind and becoming technological illiterates. Technology companies are constantly struggling to find effective ways to help customers or potential customers understand the advantages and/or the operation of their new products. It is up to those who are in fact staying up with the changes to communicate the significance of those changes to those who are not keeping up, in order to maintain a focus of competing successfully in the marketplace.

Once you have defined these two basic elements, purpose and audience, for a specific work of technical communication, you will need to analyze and clarify each before making a decision on what to say and how to say it. For example, when writing a memo or participating in a meeting concerning a high-tech local area network (LAN) purchase, would you make the request to the networking manager in the same way as you would to the chief financial officer? What if both of these people were going to be in the meeting room together? What do you do in that situation? We won't answer those questions here, but as you progress through the course, your ability to deal with diverse, ever-changing communication situations will grow. For now, remember that knowing your audience and focusing on your purpose usually carries equal weight when designing a technical communication. Letting one or both elements slide can reduce the effectiveness and clarity of your expression effort and can make the difference between a successful outcome and a botched job.

1.3 Documenting Processes and Instructions

You will learn about process documentation in this module. Process documentation is different from instruction documentation in both its form and function.

In simple terms, **process documentation** explains how something happens, the flow of the activities and any data, information or knowledge transfers, whereas **instruction documentation** (sets of instructions) describe how to complete a specific task.

In this module you will create a set of instructions using a *step-action table*. A step-action table is a very basic device used to structure and display ordered instructions. The step-action table assignment will both reinforce the principles of effective document design and encourage you to use many of the layout and design features of a word processor.

Once the first draft of your instruction set is completed, have someone try to follow your instructions. Doing so is considered basic *end-user documentation testing*, but you may be surprised at the feedback you get. Something that seems very straightforward to you may be confusing to your user, especially if the process is one with which you are very familiar. When

we are familiar with a task, we tend to internalize it to the point that we skip steps or over-simplify directions that are, in reality, quite complex.

1.4 The Seven Characteristics of Effective Technical Communication

While every instance of technical expression is different, there are several measures of quality that characterize all technical communication output, whether in an oral, written or visual form or some combination of the three modes. These include:

- Honesty
- Clarity
- Accuracy
- Comprehensiveness
- Accessibility
- Conciseness
- Professional appearance

1.5 Fundamentals of document design
Effective Document Design

A document has been well designed if it allows the reader to recognize a pattern (where certain kinds of information can be located). How do you achieve this?

According to learning theory, readers find information much more accessible if you visual patterns are present that help readers locate, comprehend, and retain information. These three techniques will assist you in creating these visual patterns:

- Chunking
- Queuing
- Filtering

Chunking

Chunking is splitting information into small, "bite-size" pieces, rather than providing it all at once. Compare these two writing samples. Which one would you rather read?

Non-chunked text
The final purpose of the course, enjoying the experience, "wraps" the other purposes together. "Tremendous power exists in the fact of continued improvement and the delivery of results. Point to tangible accomplishments — however incremental at first — and show how these steps fit into the context of an overall concept that will work. When you do this in such a way that people see and feel the buildup of momentum, they will line up with enthusiasm" (Collins, 2001). Enjoyment has a direct relationship to accomplishment. Plans that can be measured bring happiness to the people accomplishing the plan (Good to Great). What are the competencies of a Manager? The objective of Process Management Applications is to build the competencies of the participants. These competencies are: Flexibility — Adapts to change in the work environment; effectively copes with stress and change. Leadership — Demonstrates and encourages high standards of behavior; adapts leadership style to situation and people. Influencing and Negotiating — Provides information to key groups and individuals; uses negotiation and persuasion in dealing with others to achieve goals. Planning — Establishes plans and priorities with coordination of others. Decisiveness — Takes action and risks when

needed; makes difficult decisions when necessary. Interpersonal Skills — Considers and responds to the needs, feelings, capabilities, and interests of others. Problem Solving — Analyzes relevant information and encourages alternate solutions and plans to solve problems. Creative Thinking — Develops insights and solutions; fosters innovation.

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Queuing

Queuing uses visual breaks (in material that has a logical link) to create levels of importance within that material. This is the visual equivalent of the traditional essay outline where Roman numerals are used to indicate points and sub-points:

For example:

Musical Scales are the building blocks of Western Music. They can be divided into two types of scales, Major and Minor Scales.

1. Major Scales consist of two whole tones followed by a half tone followed by three more whole tones and a half tone.

1. An example would be C major which has no sharp or flats.
2. Another example would be F major which has a B^b.
2. Minor Scales consist of one whole tone followed by a half tone followed by two whole tones, followed by a semitone and finally two whole tones.
1. An example would be A minor which has an G#.
2. Another example would be A harmonic minor.
1. Harmonic and melodic minors are variants of the minor key.

Filtering

Filtering distinguishes text by dividing it on the page, using the same font styles for particular information and using graphics or logos to identify information (a stop sign to indicate critical information, for example). See the following user guide as an example of a text that uses filtering to assist its audience.

[Filtering example](#)

1.5.1 Other Elements of Effective Page Layout

Your textbook provides a great deal of information on the use of white space. Familiarize yourself with the correct way to lay out your page, and how to use graphics, tables, and figures in a document. Following these guidelines will make your document look more professional and make it easier for your audience to find the information that they need.

Dressing up your Document

Making sure your documents look professional adds credibility to what you have to say. In fact, it is not much different from dressing appropriately for an interview or a first client meeting. Either way, you have one chance to make a good first impression. When writing technical documents, you may need to "dress it up" using the right design elements.

How you dress up a document will of course depend upon the situation and audience. If you are writing an e-mail or quick memo, then you may reduce or eliminate the visuals and graphic elements. When writing a more elaborate report for a client, you will want to make sure it has been built on a solid visual and professional foundation.

Document Design

Earlier in this course it was suggested that it was not a good idea to leap into writing the document but to create a plan based on an outline. It is worth repeating that the creation of an outline can give you a framework to follow for your document creation and construction. Good writers first develop outlines to provide them with a quick view of concepts and their relation to one another. An outline can help establish priorities and make the document flow smoothly and logically.

The outline is a way to help break up your ideas into logical chunks of information because most individuals need to process smaller units of technical data. Visually, you can achieve this using some basic rules that can help your readers:

- How often do you open a piece of junk mail or a more credible document and view a "wall of text"? Does this make you want to read the information? Most of us will naturally look for a

way to grasp the information quickly. When that doesn't work we often decide to just put it down and ignore it.

- You should always create a document that provides an easy entry for your readers using white space, headings, and lists of important information. If you can design recognizable patterns or paths within the text to help your readers grasp the information, then you have made everyone's job easier.

10 seconds . . . 30 seconds and the Detailed Reader

Some individuals in your target group will have more time to read your document than others. Most executives look for "just the facts" without wanting to engage in a long discourse. Depending upon your audience, you must be sensitive to their time constraints. While the information may be of interest to all parties (especially you), just how much time will a reader be willing to devote to a 20-page treatise on the implications and cost of a new wireless network? Don't assume you will always get your reader's undivided attention.

Often, your audience may not be so narrow in scope. How do you write for the vice president of marketing and the chief financial officer at the same time? The best way is to maintain some flexibility in your document design and make sure you write for the 10-second, the 30-second, and the more committed reader.

If you make your information easy to find, then when readers put down your document, they will find it easy to pick it up and read more of your material. Don't assume everyone will digest your document in one sitting. Make sure your main points can be quickly seen and understood by a busy reader who glances at it even if it is for only a few seconds.

Other Design Considerations

Good document design should include the queues necessary for your readers to easily find what they want or to pick up where they left off. This can be achieved using good typography, proper amounts of white space, bullets, numbered lists, headings, subheadings, tables, charts, and visual patterns. Organizing the right elements on the page incorporates the rules of page design along with the concepts of a much broader area of study called learning theory.

What works on a document may not work so well on a computer screen. Too much text on a Web site may work better on paper. A detailed graphic on paper may look fine, but it could take an inordinate amount of time to access on a Web site. This course will help you understand the differences between traditional linear documents and non-linear Web pages.

Graphics and Design

While this is not a course on graphic design, it is important for non-design majors to become familiar with the essential rules of graphic design.

Graphics are the pictures you use in technical communication and other media. These can include:

Drawings

- Maps
- Photographs
- Diagrams
- Charts

- Graphs
- Tables

  Graphics are important in communicating technical information that cannot always be effectively put into words. You will learn how to effectively incorporate graphics into your document or Web pages using some elements and principles of design as described below.

- **Shape** – Shape refers to the general outline of an object. The lines bordering the design describe and make up a shape. The shape defines the space.
- **Balance** – Balance refers to the equal distribution of weight among the objects on the page. When a design is balanced, it holds together and is more comfortable to view. The visual factors that relate to balance include weight, position, and the arrangement of the objects (both words and graphics) on the page.
- **Rhythm & Unity** – Rhythm is a pattern that is created by repeating or varying elements within the document, with consideration given to the space between them. Rhythm establishes a sense of movement from one object to the next. Rhythm can be created by unity, which is the organization of elements in a design whose elements look as though they belong together. The visual unity of the whole design is referred to as the Gestalt.
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  - Hue – synonymous with your concept of color.

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Week 5 Study Notes
Introduction
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Study Notes

1.1 What is Technical Communication *not* about?
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1.3 Documenting Processes and Instructions

You will learn about process documentation in this module. Process documentation is different from instruction documentation in both its form and function.

In simple terms, **process documentation** explains how something happens, the flow of the activities and any data, information or knowledge transfers, whereas **instruction documentation** (sets of instructions) describe how to complete a specific task.

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While every instance of technical expression is different, there are several measures of quality that characterize all technical communication output, whether in an oral, written or visual form or some combination of the three modes. These include:

- Honesty
- Clarity
- Accuracy
- Comprehensiveness
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- Professional appearance

1.5 Fundamentals of document design
Effective Document Design

A document has been well designed if it allows the reader to recognize a pattern (where certain kinds of information can be located). How do you achieve this?

According to learning theory, readers find information much more accessible if you visual patterns are present that help readers locate, comprehend, and retain information. These three techniques will assist you in creating these visual patterns:

- Chunking
- Queuing
- Filtering

Chunking

Chunking is splitting information into small, "bite-size" pieces, rather than providing it all at once. Compare these two writing samples. Which one would you rather read?

Non-chunked text

The final purpose of the course, enjoying the experience, "wraps" the other purposes together. "Tremendous power exists in the fact of continued improvement and the delivery of results. Point to tangible accomplishments — however incremental at first — and show how these steps fit into the context of an overall concept that will work. When you do this in such a way that people see and feel the buildup of momentum, they will line up with enthusiasm" (Collins, 2001). Enjoyment has a direct relationship to accomplishment. Plans that can be measured bring happiness to the people accomplishing the plan (Good to Great). What are the competencies of a Manager? The objective of Process Management Applications is to build the competencies of the participants. These competencies are: Flexibility — Adapts to change in the work environment; effectively copes with stress and change. Leadership — Demonstrates and encourages high standards of behavior; adapts leadership style to situation and people. Influencing and Negotiating — Provides information to key groups and individuals; uses negotiation and persuasion in dealing with others to achieve goals. Planning — Establishes plans and priorities with coordination of others. Decisiveness — Takes action and risks when needed; makes difficult decisions when necessary. Interpersonal Skills — Considers and responds to the needs, feelings, capabilities, and interests of others. Problem Solving — Analyzes relevant information and encourages alternate solutions and plans to solve problems. Creative Thinking — Develops insights and solutions; fosters innovation.

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Queuing

Queuing uses visual breaks (in material that has a logical link) to create levels of importance within that material. This is the visual equivalent of the traditional essay outline where Roman numerals are used to indicate points and sub-points:

For example:

Musical Scales are the building blocks of Western Music. They can be divided into two types of scales, Major and Minor Scales.

1. Major Scales consist of two whole tones followed by a half tone followed by three more whole tones and a half tone.
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Filtering example

1.5.1 Other Elements of Effective Page Layout
Your textbook provides a great deal of information on the use of white space. Familiarize yourself with the correct way to lay out your page, and how to use graphics, tables, and figures

in a document. Following these guidelines will make your document look more professional and make it easier for your audience to find the information that they need.

Dressing up your Document

Making sure your documents look professional adds credibility to what you have to say. In fact, it is not much different from dressing appropriately for an interview or a first client meeting. Either way, you have one chance to make a good first impression. When writing technical documents, you may need to "dress it up" using the right design elements.

How you dress up a document will of course depend upon the situation and audience. If you are writing an e-mail or quick memo, then you may reduce or eliminate the visuals and graphic elements. When writing a more elaborate report for a client, you will want to make sure it has been built on a solid visual and professional foundation.

Document Design

Earlier in this course it was suggested that it was not a good idea to leap into writing the document but to create a plan based on an outline. It is worth repeating that the creation of an outline can give you a framework to follow for your document creation and construction. Good writers first develop outlines to provide them with a quick view of concepts and their relation to one another. An outline can help establish priorities and make the document flow smoothly and logically.

The outline is a way to help break up your ideas into logical chunks of information because most individuals need to process smaller units of technical data. Visually, you can achieve this using some basic rules that can help your readers:

- How often do you open a piece of junk mail or a more credible document and view a "wall of text"? Does this make you want to read the information? Most of us will naturally look for a way to grasp the information quickly. When that doesn't work we often decide to just put it down and ignore it.
- You should always create a document that provides an easy entry for your readers using white space, headings, and lists of important information. If you can design recognizable patterns or paths within the text to help your readers grasp the information, then you have made everyone's job easier.

10 seconds . . . 30 seconds and the Detailed Reader

Some individuals in your target group will have more time to read your document than others. Most executives look for "just the facts" without wanting to engage in a long discourse. Depending upon your audience, you must be sensitive to their time constraints. While the information may be of interest to all parties (especially you), just how much time will a reader be willing to devote to a 20-page treatise on the implications and cost of a new wireless network? Don't assume you will always get your reader's undivided attention.

Often, your audience may not be so narrow in scope. How do you write for the vice president of marketing and the chief financial officer at the same time? The best way is to maintain some flexibility in your document design and make sure you write for the 10-second, the 30-second, and the more committed reader.

If you make your information easy to find, then when readers put down your document, they will find it easy to pick it up and read more of your material. Don't assume everyone will digest

your document in one sitting. Make sure your main points can be quickly seen and understood by a busy reader who glances at it even if it is for only a few seconds.

Other Design Considerations

Good document design should include the queues necessary for your readers to easily find what they want or to pick up where they left off. This can be achieved using good typography, proper amounts of white space, bullets, numbered lists, headings, subheadings, tables, charts, and visual patterns. Organizing the right elements on the page incorporates the rules of page design along with the concepts of a much broader area of study called learning theory.

What works on a document may not work so well on a computer screen. Too much text on a Web site may work better on paper. A detailed graphic on paper may look fine, but it could take an inordinate amount of time to access on a Web site. This course will help you understand the differences between traditional linear documents and non-linear Web pages.

Graphics and Design

While this is not a course on graphic design, it is important for non-design majors to become familiar with the essential rules of graphic design.

Graphics are the pictures you use in technical communication and other media. These can include:

Drawings

- Maps
- Photographs
- Diagrams
- Charts
- Graphs
- Tables
  Graphics are important in communicating technical information that cannot always be effectively put into words. You will learn how to effectively incorporate graphics into your document or Web pages using some elements and principles of design as described below.
- **Shape** – Shape refers to the general outline of an object. The lines bordering the design describe and make up a shape. The shape defines the space.
- **Balance** – Balance refers to the equal distribution of weight among the objects on the page. When a design is balanced, it holds together and is more comfortable to view. The visual factors that relate to balance include weight, position, and the arrangement of the objects (both words and graphics) on the page.
- **Rhythm & Unity** – Rhythm is a pattern that is created by repeating or varying elements within the document, with consideration given to the space between them. Rhythm establishes a sense of movement from one object to the next. Rhythm can be created by unity, which is the organization of elements in a design whose elements look as though they belong together. The visual unity of the whole design is referred to as the Gestalt.
- **Visual Hierarchy** – Visual hierarchy places a point of emphasis, or the focal point, on the main subject. The two types are:
- o Focal point–where on the page you want the viewer to look first.

- o Accents–the elements that back up the focal point.
- **Figure/Ground** Figure and ground refer to the page (ground or background) and the objects (figures) on the page. Figure and ground are also referred to as positive and negative space. Positive space is the dominant space made by the figure. Negative space is the space around the positive space. A common term used in design is figure/ground relationship, which means how the figure relates in space to its background.
- **Dominant/Subdominant/Subordinate** Dominant, subdominant, and subordinate objects are the hierarchy of objects that are seen by the reader.
  - o Dominant – the object that takes up the most focal room. This can be achieved by size, color, relationship, texture, etc. The viewer should see the dominant object first.
  - o Subdominant – the object that is second in command. The viewer should be led to this object after the dominant object.
  - o Subordinate – the smallest object on the page. The viewer should see the subordinate object last.
- **Tension** – Tension refers to the emphasis placed on one area that causes uneasiness at another area. Tension is sometimes achieved by squeezing letters together or by putting opposing shapes close together.
- **Flow** – Flow describes when objects are arranged in a design so that the viewer's eyes are led from one element to another. Flow is one way to force the viewer to look at objects in a specific order. The order is usually from left to right or from the largest to smallest object (although this bias is particular only to some cultures, including the U.S.).
- **Color** – Color is the characteristic of the design that is caused by differing qualities of the light reflected or emitted by them. Color characteristics can be divided into three aspects*:
  - o Hue – synonymous with your concept of color.
  - o Saturation – the intensity or the saturation of a color. The greyer or more neutral a color is the less saturation it has.
  - o Value – the lightness or darkness of a color. Lightened values are called tints and darkened values are known as shades.
  - o *HSV (hue, saturation, value) is also often referred to as HSB (hue, saturation, and brightness).
- **Characteristics of Effective Graphics -** To be effective, a graphic must be understandable and meaningful with the larger narrative in your document or Web design. There are several guidelines that can help make your graphics more effective.
  - o All graphics should have purpose. Make sure that your image can help the reader attain and retain the information. Avoid using meaningless or poorly chosen images or clip art.
  - o A graphic should display truthful information. Graphics, like text, can convey dishonest information. As the author, you are responsible for making sure that all the elements of your document are honest and truthful in nature.
  - o A graphic should be simple. This is not always easy, given the complexities of the technical data being displayed.
  - o Each graphic should present a manageable amount of information. Presenting too much information to your readers runs the risk you may confuse and ultimately lose your readers. You will need to refer back to your audience and their expectations. What kinds of graphics is your audience comfortable with? Are they familiar with the topic? Are the technical issues too difficult for some of your readers?

- Graphics should meet a reader's expectations of convention. This module will help you understand some of the graphical conventions that all of us experience as readers of documents and Web sites. When you follow the conventions (e.g., putting a title on the top of a page), your reader will expect to know where to find it.
- Every graphic should be clearly labeled with captions or headings. Except for a brief or informal communiqué, make sure that all graphics you incorporate into your document have a title that is clearly labeled and informs the reader.
- Graphics also should have captions (for those who are scanning the document rather than reading the document to use the information within it). If the graphic is referred to in the text, the label should be used instead of a proximity term such as "below" or "above."

Week 6 Study Notes
Introduction
Like all specialized forms of communication, business writing has particular qualities that have evolved to meet the needs of audiences engaged in particular activities and working to achieve particular goals. The instruction and activities in this course focus on how to compose more or less traditional genres of business writing that have evolved to achieve practical aims associated with modern business environments. In this week, we will cover some basic terminology useful for understanding the special requirements of business and professional writing and how it is similar or different from academic writing.

Key Points

1.1 Rhetorical Situations in Business Environments
As you learned in your lower-division writing classes, the *rhetorical situation* (or writing situation) refers to the key contextual elements involved in a particular communication event or transaction. The rhetorical situation consists of three basic pieces:
- The *audience* (including her, his, their values, needs, competencies, and desires)
- The *author* (including his, her, their aims in communicating on a particular occasion)
- The *message* (speeches, letters, reports, etc.) created by the author to communicate with the audience
Within business and professional environments, the rhetorical situation typically involves specific business-related activities, such as completing routine tasks, achieving common goals, or building working relationships, each of which varies more or less from industry to industry, firm to firm, and project to project. The sections below elaborate on these three basic aspects of the rhetorical situation (going from last to first) to help you further understand the special contexts of business and professional writing.

1.2 The Message: Forms (or Genres) of Business Writing
While each written message is a more or less unique result of the rhetorical situation that produced it, students of writing and speech have long been keen to identify reliable—and so regularly used—techniques and strategies. Some ways of treating particular ideas and

information are so common, that they have been given generic labels. By now, you are no doubt familiar with a variety of *written genres* associated with the common aims and interests of academic writers and audiences. Exploratory essays, lab reports, empirical research papers, annotated bibliographies, and so on, all having special requirements stipulating which kinds of ideas should be discussed and how they should be treated in order to demonstrate understanding, discovery, and critical thinking—the general aims of any academic writing situation. Many genres are also directly associated with particular *presentation formats* (e.g... APA formatting for an academic research paper) and particular *grammatical and stylistic conventions*. When beginning any writing project, consider examining the conventions for the genre itself, since those conventions often reflect the key purposes of and expectations for the kind of writing you are about to undertake.

Business writing too has particular qualities that have evolved to meet the needs of its authors and audiences, that is, individuals and groups engaged in particular business activities. As you probably know, business writing comes in a variety of genres—letters of various kinds, reports with various foci, informative memos, policy statements, job descriptions, and so on—each of which has been adapted to achieve specific purposes related to completing collaborative work. While some forms of business writing have evolved more quickly than others, especially since the advancement of electronic media, many traditional forms are still relevant. In this class, we will work with a variety of traditional and new genres composed in both print and electronic media. The instruction and assignments of this course will discuss these two fundamental groups of business genres:

- **Business correspondence.** Arguably, the bulk of your business communication will be conducted through business letters, memos, e-mails, and now instant text messages. Typically, business letters are used for external audiences and memos are used to communicate to internal audiences. E-mails are used for both internal and external audiences, but formatted and arranged differently depending on the writer's purpose and the type of relationship shared by the writer and audience. Although many organizations have their own formal and informal expectations about the format and tone of written communication, some conventions and expectations are common.
- **Business reports and proposals.** The term *report* is often used to refer to a variety of longer documents used to conduct business. These longer documents usually have much more specific purposes than reporting information. For instance, there are more or less specialized genres of reports: market analysis, feasibility studies, progress reports, and so on.

1.3 The Author: Common Aims for Business Writers

Though traditional and modern forms of business writing have evolved to suit more or less special needs and purposes, there are a few general aims of writing that commonly appear across a variety of business genres. Here is a simple breakdown of just a few general aims and some examples of documents that are commonly written to achieve those aims:

Informing: While most writing informs readers of some kind of detail or idea, many forms of business writing are specially designed to accommodate the kind of information required to complete work-related activities. Such writing not only communicates information necessary for completing work, but it also documents the fact that such work has taken place. Consequently, accuracy and clarity are highly prized in informative writing. Informative writing

can go beyond work details, however, to discuss broader topics, such as industry trends and outside influences on the business environment. Here are some examples of informative writing in business environments:

- Memos, e-mails, and letters announcing actions or policies
- Résumés
- Job descriptions
- Employee handbooks
- Market reports
- Feasibility studies

Persuading: At times, everyone in an organization needs to influence the thoughts and actions of others. Persuasive writing is especially useful in business environments because it allows a writer to move an audience to change beliefs, attitudes, and behaviors without the need for extra material incentives or other forms of coercion. Here are some examples of persuasive writing in business environments:

- Memos, e-mails, and letters asking readers to perform a particular action
- Job application letters
- Sales letters
- Project proposals

Evaluating: One especially common kind of persuasive writing is evaluative writing, wherein the writer asserts a positive or negative opinion about a product, process, organization, or person. Evaluative writing helps individuals make decisions, even if the evaluative writing itself does not make a clear recommendation for action. Evaluative writing can simply be done for the record, as is the case with performance reviews, for instance. But evaluative writing can also be initiated specifically for the purposes of weighing a person's or organization's options. Finally, evaluative writing is often done in passing, for instance, in concluding statements for informative reports. Here are some examples of evaluative writing in business environments:

- Memos, e-mails, and letters of praise and complaint
- Letters of recommendation
- Performance reviews
- Product reviews

1.4 The Audience: Writing for Colleagues and Coworkers

One of the challenges of writing in today's work environments includes understanding one's audience. As work forces become more mobile and diversified, in terms of cultural backgrounds and technical expertise, audiences are no longer easy to lump into broad categories based on organizational roles (e.g....., managers, line workers, executives, etc.). Moreover, you may be addressing an audience including many people having different backgrounds. Even so, there are

some common questions you can ask to help you narrow the focus of your writing and tailor the form of your writing to achieve its aims:

- What does your audience know about the general subject you are writing about?
- What does your audience know about the specific issue you are writing about?
- What types of actions do you expect to result from your writing?

In spite of their differences, one unifying quality of business audiences stands out: members of these audiences are all potential collaborators or already directly involved in the business at hand. When addressing professional audiences (i.e...., colleagues in your field of study who may not be coworkers), for instance, you have the common aim of considering best practices and improving the standard operating procedures for the kind of work you do. When addressing coworkers, you have the common aim to achieve particular organizational goals.

In the latter case, even though you might primarily address individuals you know personally, you still need to analyze them as an audience to understand their priorities and competencies. In fact, much internal business communication involves cross-disciplinary communication, wherein experts are communicating with non-experts, or "lay" audiences. This kind of expert-to-lay communication occurs for both operational and reflective purposes, as coworkers from different specialties collaborate to achieve the organization's mission and then weigh the results of specific actions.

1.5 Build on What You Know: Adapting Academic Writing Skills to Business Purposes

Most of the writing and thinking skills you develop as a student can be transferred to business and professional environments. Indeed, employers expect college graduates to be able to write according to academic standards. While business communication has its own special qualities, which vary depending on the audience and purpose of the message, you can expect to use the following academic skills in any professional environment:

Critical Reading: As an employee or entrepreneur you can expect to receive many documents on a regular basis. Some will be extremely important; others will simply be for your information. To be an effective and responsive worker, you will need to analyze the documents and weigh their importance to your responsibilities and interests, both of which require critical reading skills. Critical reading consists of the following steps:

- *Preview* – Quickly skim the title, author, headings, visuals, first and last paragraphs, and first sentence of each paragraph in between to get a "big picture" of the document.
- *Annotate* – Use any of the following methods while reading to note key points: Underlining or circling key words and phrases, writing notes in the margin, and drawing visuals in the margin that capture key points.
- *Analyze* – Identify major points made within the document and relate them to one another.
- *Summarize* – In a few paragraphs or less, capture the major topic, key points, and supporting points to convey an abridged version of the document.

- *Synthesize* – Consider all the information as it relates to your existing knowledge and evaluate its relevance, credibility, and usability, and form an opinion.

Thoughtful Writing: Besides receiving documents to read, you will have the opportunity to respond. When done critically and carefully, your writing can greatly influence your coworkers and colleagues. Thoughtful writing consists of the following steps:

- Identify the issue that needs attention.
- Take a clear stand on the issue.
- Support and develop your position with evidence.
- Appeal to your audience's interests.
- Consider opposing viewpoints.

Careful Research: Research skills help business communicators acquire accurate information upon which to base decisions. Consider these observations and suggestions when using research in business communication:

- The two main types of research are primary and secondary.
- Using a wide range of sources--including journals, trade publications, and news sources--can give you a fuller picture of the topic you are researching.
- A business professional assesses research for relevance and reliability.
- Citing your sources accurately and completely is crucial in gaining credibility in your writing. For course assignments at Franklin University, sources are cited according to *American Psychological Association* (APA) format.

1.6 Annotated Bibliographies

You can create *annotated references* (commonly called *annotated bibliographies*) for business documents that you locate online. Annotated reference entries generally include two key parts: (a) a full citation of the document (in this case, using APA format) and (b) one or more paragraphs summarizing and evaluating the audience, purpose, and content of the source. The nature of the notes tends to vary depending on the purpose of the annotated reference. As a rule, write two paragraphs for each source, the first identifying the intended audience and purpose of the document, as well as the key points it conveys, and the second critiquing the effectiveness of the source in achieving its purpose with the intended audience.

Tips: You can use a common Internet search engine to locate your documents, but this strategy may result in a number of "academic" models from educational or self-help Web sites. These models may offer useful guidance, but will not be as interesting as some business documents posted directly on organizational or corporate Web sites. You might find it especially interesting to search the sites of organizations or companies with which you have already had positive or negative experiences. Consider also searching the sites of businesses for which you might like to work.

Just as noted above, this annotated reference entry will include two key parts: (a) a full APA citation of the article and (b) one or more paragraphs summarizing and evaluating the article. As a rule, write two paragraphs for the article, the first identifying the intended audience and purpose of the article, as well as key points conveyed, and the second evaluating the strengths and weaknesses of the claims and reasoning of the article.

Tips:

- Although you can use *Academic Search Complete*, which includes sources from a variety of disciplines, consider narrowing your search using a more specialized database: for example, *Business Source Complete* or *Computers and Applied Sciences Complete*.
- A scholarly journal should be *peer reviewed*, which means that multiple professionals in the field review each article published. Articles in other publications are generally reviewed only by the editors of the publication, who may or may not be experts in the field. You can usually determine whether a journal is peer reviewed by reviewing the research database's full record for the publication in question.
- To narrow your results to show just journal articles, use filtering mechanisms. *Academic Search Complete*, for example, allows you to filter results by clicking on a "Source Type" (e.g....., "Academic Journals"; "Trade Publications"; etc.), which is an option listed on the left-hand pane of the results page.
- Experiment with different search terms to narrow your results to fit the requirements outlined above. Start by entering a general term, such as "communication" or "collaboration." Then add a term to limit it to your academic field, such as "finance" or "design." Finally, add a term to locate an article on a critical issue like "ethics" ("fraud"; "privacy"; etc.) or "effectiveness" ("cost"; "efficiency"; etc.). If you end up with few results, remove a term, try others, or browse through the articles to find something that fits the research goal.
- DO NOT copy the summary of the article provided by the research database into your annotated reference. This is plagiarism. Instead, write your own summary highlighting what stands out to you in the article.

1.7 Conclusion

Business communication is becoming increasingly important as businesses forge ahead in today's changing climate. It is no longer safe to assume you can "just do your job." Rather, today's business professional is often called upon to interface with internal and external audiences of all levels, deliver impromptu written and oral presentations, quickly assess a product or process for potential adoption into the business, and convey critical information to decision makers. Understanding the basics of business communication and how to critically evaluate written and spoken communication provides one foundational component to succeed in today's workplace.

Week 7 Study Notes
Introduction

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Tips: You can use a common Internet search engine to locate your documents, but this strategy may result in a number of "academic" models from educational or self-help Web sites. These models may offer useful guidance, but will not be as interesting as some business documents posted directly on organizational or corporate Web sites. You might find it especially interesting to search the sites of organizations or companies with which you have already had positive or negative experiences. Consider also searching the sites of businesses for which you might like to work.

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Tips:
- Although you can use *Academic Search Complete*, which includes sources from a variety of disciplines, consider narrowing your search using a more specialized database: for example, *Business Source Complete* or *Computers and Applied Sciences Complete*.
- A scholarly journal should be *peer reviewed*, which means that multiple professionals in the field review each article published. Articles in other publications are generally reviewed only by the editors of the publication, who may or may not be experts in the field. You can usually determine whether a journal is peer reviewed by reviewing the research database's full record for the publication in question.
- To narrow your results to show just journal articles, use filtering mechanisms. *Academic Search Complete*, for example, allows you to filter results by clicking on a "Source Type" (e.g.....,

"Academic Journals"; "Trade Publications"; etc.), which is an option listed on the left-hand pane of the results page.

- Experiment with different search terms to narrow your results to fit the requirements outlined above. Start by entering a general term, such as "communication" or "collaboration." Then add a term to limit it to your academic field, such as "finance" or "design." Finally, add a term to locate an article on a critical issue like "ethics" ("fraud"; "privacy"; etc.) or "effectiveness" ("cost"; "efficiency"; etc.). If you end up with few results, remove a term, try others, or browse through the articles to find something that fits the research goal.
- DO NOT copy the summary of the article provided by the research database into your annotated reference. This is plagiarism. Instead, write your own summary highlighting what stands out to you in the article.

1.7 Conclusion

Business communication is becoming increasingly important as businesses forge ahead in today's changing climate. It is no longer safe to assume you can "just do your job." Rather, today's business professional is often called upon to interface with internal and external audiences of all levels, deliver impromptu written and oral presentations, quickly assess a product or process for potential adoption into the business, and convey critical information to decision makers. Understanding the basics of business communication and how to critically evaluate written and spoken communication provides one foundational component to succeed in today's workplace.

Week 9 Study Notes
Introduction

Like all specialized forms of communication, business writing has particular qualities that have evolved to meet the needs of audiences engaged in particular activities and working to achieve particular goals. The instruction and activities in this course focus on how to compose more or less traditional genres of business writing that have evolved to achieve practical aims associated with modern business environments. In this week, we will cover some basic terminology useful for understanding the special requirements of business and professional writing and how it is similar or different from academic writing.

Key Points

1.1 Rhetorical Situations in Business Environments

As you learned in your lower-division writing classes, the *rhetorical situation* (or writing situation) refers to the key contextual elements involved in a particular communication event or transaction. The rhetorical situation consists of three basic pieces:

- The *audience* (including her, his, their values, needs, competencies, and desires)
- The *author* (including his, her, their aims in communicating on a particular occasion)

- The *message* (speeches, letters, reports, etc.) created by the author to communicate with the audience

Within business and professional environments, the rhetorical situation typically involves specific business-related activities, such as completing routine tasks, achieving common goals, or building working relationships, each of which varies more or less from industry to industry, firm to firm, and project to project. The sections below elaborate on these three basic aspects of the rhetorical situation (going from last to first) to help you further understand the special contexts of business and professional writing.

1.2 The Message: Forms (or Genres) of Business Writing

While each written message is a more or less unique result of the rhetorical situation that produced it, students of writing and speech have long been keen to identify reliable—and so regularly used—techniques and strategies. Some ways of treating particular ideas and information are so common, that they have been given generic labels. By now, you are no doubt familiar with a variety of *written genres* associated with the common aims and interests of academic writers and audiences. Exploratory essays, lab reports, empirical research papers, annotated bibliographies, and so on, all having special requirements stipulating which kinds of ideas should be discussed and how they should be treated in order to demonstrate understanding, discovery, and critical thinking—the general aims of any academic writing situation. Many genres are also directly associated with particular *presentation formats* (e.g... APA formatting for an academic research paper) and particular *grammatical and stylistic conventions*. When beginning any writing project, consider examining the conventions for the genre itself, since those conventions often reflect the key purposes of and expectations for the kind of writing you are about to undertake.

Business writing too has particular qualities that have evolved to meet the needs of its authors and audiences, that is, individuals and groups engaged in particular business activities. As you probably know, business writing comes in a variety of genres—letters of various kinds, reports with various foci, informative memos, policy statements, job descriptions, and so on—each of which has been adapted to achieve specific purposes related to completing collaborative work. While some forms of business writing have evolved more quickly than others, especially since the advancement of electronic media, many traditional forms are still relevant. In this class, we will work with a variety of traditional and new genres composed in both print and electronic media. The instruction and assignments of this course will discuss these two fundamental groups of business genres:

- **Business correspondence.** Arguably, the bulk of your business communication will be conducted through business letters, memos, e-mails, and now instant text messages. Typically, business letters are used for external audiences and memos are used to communicate to internal audiences. E-mails are used for both internal and external audiences, but formatted and arranged differently depending on the writer's purpose and the type of relationship shared by the writer and audience. Although many organizations have their own formal and informal expectations about the format and tone of written communication, some conventions and expectations are common.

- **Business reports and proposals.** The term *report* is often used to refer to a variety of longer documents used to conduct business. These longer documents usually have much more specific purposes than reporting information. For instance, there are more or less specialized genres of reports: market analysis, feasibility studies, progress reports, and so on.

1.3 The Author: Common Aims for Business Writers

Though traditional and modern forms of business writing have evolved to suit more or less special needs and purposes, there are a few general aims of writing that commonly appear across a variety of business genres. Here is a simple breakdown of just a few general aims and some examples of documents that are commonly written to achieve those aims:

Informing: While most writing informs readers of some kind of detail or idea, many forms of business writing are specially designed to accommodate the kind of information required to complete work-related activities. Such writing not only communicates information necessary for completing work, but it also documents the fact that such work has taken place. Consequently, accuracy and clarity are highly prized in informative writing. Informative writing can go beyond work details, however, to discuss broader topics, such as industry trends and outside influences on the business environment. Here are some examples of informative writing in business environments:

- Memos, e-mails, and letters announcing actions or policies
- Résumés
- Job descriptions
- Employee handbooks
- Market reports
- Feasibility studies

Persuading: At times, everyone in an organization needs to influence the thoughts and actions of others. Persuasive writing is especially useful in business environments because it allows a writer to move an audience to change beliefs, attitudes, and behaviors without the need for extra material incentives or other forms of coercion. Here are some examples of persuasive writing in business environments:

- Memos, e-mails, and letters asking readers to perform a particular action
- Job application letters
- Sales letters
- Project proposals

Evaluating: One especially common kind of persuasive writing is evaluative writing, wherein the writer asserts a positive or negative opinion about a product, process, organization, or person. Evaluative writing helps individuals make decisions, even if the evaluative writing itself does not make a clear recommendation for action. Evaluative writing can simply be done for the record, as is the case with performance reviews, for instance. But evaluative writing can also be initiated specifically for the purposes of weighing a person's or organization's options. Finally, evaluative writing is often done in passing, for instance, in concluding statements for informative reports. Here are some examples of evaluative writing in business environments:

- Memos, e-mails, and letters of praise and complaint

- Letters of recommendation
- Performance reviews
- Product reviews

1.4 The Audience: Writing for Colleagues and Coworkers

One of the challenges of writing in today's work environments includes understanding one's audience. As work forces become more mobile and diversified, in terms of cultural backgrounds and technical expertise, audiences are no longer easy to lump into broad categories based on organizational roles (e.g....., managers, line workers, executives, etc.). Moreover, you may be addressing an audience including many people having different backgrounds. Even so, there are some common questions you can ask to help you narrow the focus of your writing and tailor the form of your writing to achieve its aims:

- What does your audience know about the general subject you are writing about?
- What does your audience know about the specific issue you are writing about?
- What types of actions do you expect to result from your writing?

In spite of their differences, one unifying quality of business audiences stands out: members of these audiences are all potential collaborators or already directly involved in the business at hand. When addressing professional audiences (i.e...., colleagues in your field of study who may not be coworkers), for instance, you have the common aim of considering best practices and improving the standard operating procedures for the kind of work you do. When addressing coworkers, you have the common aim to achieve particular organizational goals.

In the latter case, even though you might primarily address individuals you know personally, you still need to analyze them as an audience to understand their priorities and competencies. In fact, much internal business communication involves cross-disciplinary communication, wherein experts are communicating with non-experts, or "lay" audiences. This kind of expert-to-lay communication occurs for both operational and reflective purposes, as coworkers from different specialties collaborate to achieve the organization's mission and then weigh the results of specific actions.

1.5 Build on What You Know: Adapting Academic Writing Skills to Business Purposes

Most of the writing and thinking skills you develop as a student can be transferred to business and professional environments. Indeed, employers expect college graduates to be able to write according to academic standards. While business communication has its own special qualities, which vary depending on the audience and purpose of the message, you can expect to use the following academic skills in any professional environment:

Critical Reading: As an employee or entrepreneur you can expect to receive many documents on a regular basis. Some will be extremely important; others will simply be for your information. To be an effective and responsive worker, you will need to analyze the documents and weigh their importance to your responsibilities and interests, both of which require critical reading skills. Critical reading consists of the following steps:

- *Preview* – Quickly skim the title, author, headings, visuals, first and last paragraphs, and first sentence of each paragraph in between to get a "big picture" of the document.
- *Annotate* – Use any of the following methods while reading to note key points: Underlining or circling key words and phrases, writing notes in the margin, and drawing visuals in the margin that capture key points.
- *Analyze* – Identify major points made within the document and relate them to one another.
- *Summarize* – In a few paragraphs or less, capture the major topic, key points, and supporting points to convey an abridged version of the document.
- *Synthesize* – Consider all the information as it relates to your existing knowledge and evaluate its relevance, credibility, and usability, and form an opinion.

Thoughtful Writing: Besides receiving documents to read, you will have the opportunity to respond. When done critically and carefully, your writing can greatly influence your coworkers and colleagues. Thoughtful writing consists of the following steps:

- Identify the issue that needs attention.
- Take a clear stand on the issue.
- Support and develop your position with evidence.
- Appeal to your audience's interests.
- Consider opposing viewpoints.

Careful Research: Research skills help business communicators acquire accurate information upon which to base decisions. Consider these observations and suggestions when using research in business communication:

- The two main types of research are primary and secondary.
- Using a wide range of sources--including journals, trade publications, and news sources--can give you a fuller picture of the topic you are researching.
- A business professional assesses research for relevance and reliability.
- Citing your sources accurately and completely is crucial in gaining credibility in your writing. For course assignments at Franklin University, sources are cited according to *American Psychological Association* (APA) format.

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Week 10 Study Notes
Key Points

1.1 Résumés

Your résumé is a summary of your qualifications, achievements, and skills arranged into a compact, easy-to-read format. Recruiters often receive dozens or even hundreds of résumés on a weekly basis. For your résumé to stand out in a positive light, it needs to highlight the right information in the right way. While the details that go into résumés vary with the person and field of work, employers expect to see some standard parts:

- **Contact information**, including current address, phone numbers, and e-mail addresses
- **Educational background**, including degrees and the dates and institutions where you received them (arranged from latest to earliest)
- **Employment history**, including employer, dates of employment, job title, and key duties performed (arranged from latest to earliest)
- **Honors and awards** relating to your educational, work, or public service background
  Beyond these categories, you might have sections about specific skill areas, especially if you work in a technological field, but also if there are software programs or equipment standard to your kind of work.

  Format: Résumés are divided into clearly headed sections with bulleted lists underneath. As you format your résumé, standardize the presentation of details across the entire document: use the same style of bullets, regularize the listing of dates, match typefaces and styles for similar kinds of information, etc. Also, make sure the most important details stand out on the page, so recruiters can easily scan to find the details most likely to make them want to schedule an interview. Finally, make your description of work duties and achievements clear, concise, and easy to read. Choose active verbs to describe what you did. Make sure to use any technical terminology accurately. Use parallel grammatical structures for each item under the description of duties, so readers will not be jarred by sudden shifts in phrasing.

1.2 Job Application Letters

While your résumé should provide potential employers with an overview of your accomplishments, each job application letter should highlight specific qualities and achievements that are suited to the specific position sought. To make the connection between

your background and the employer's interests, you will need to research the company or organization to which you are applying. What is its mission statement? What industry does it fall under? Where are its offices located? How old is it? The answers to these kinds of questions can help you identify pieces of your own background that may or may not mesh well with the organizational culture you are trying to join. If you find much overlap between your own experiences and interests and those of the potential employer, then highlight them in your letter. If you find little overlap, but still want to work for this organization, then emphasize in your letter why you would like to try something new.

Format: Format a job application letter like you would any formal business letter. However, declare at the beginning of the letter which position you are applying for and state briefly what attracted you to the posting. In the body of the letter, highlight those achievements and experiences listed on your résumé that seem most important for the position in question. Here is a chance to add extra detail to illustrate your competency for the job. Next, demonstrate that you have done your research by highlighting the aspects of the company or position that made you want to apply. Close the letter by encouraging the recruiter to contact you for more information.

1.3 Conclusion

All writing and speaking skills improve with practice and feedback. In preparing job search materials, you can often benefit from having a professional recruiter or supervisor from your field review your materials. Professional organizations and workshops often provide opportunities to receive such feedback before entering the job search process, so that when the time comes to find a new position, your written materials and speech will work for you, not against you.

WeekS 11,12,13,14 Study Notes AS WEEK 10 STUDY NOTES