

Technical and Professional Writing

Technical and Professional Writing

Jessica Jorgenson Borchert

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What is English 301: Technical and Professional Writing

Jessica Jorgenson Borchert

Learning Objectives

- Define and describe the differences between technical and business writing
- Learn what texts exist in professional and technical writing
- Understand how technical and professional writing is important to the technical professions

What is English 301: Technical and Professional Writing?

English 301 Technical and Professional Writing is a course designed for those students who will be writing in the technical professions. You will learn how to create correspondence, descriptions, instructions, reports, and electronic presentations. You will also learn how to design documents and how to incorporate graphics into your documents. The rationale for

this class is to help prepare you for communication within professional and technical environments. In this class, you will learn the skills needed to be successful with writing and reading in your future career. This class will instruct you in the importance of maintaining good communication when working with various audiences.

English 301 Course Goals and Objectives

This course will require that you work on various projects that will help you to understand different communication situations in a professional setting. For our first project, you will examine a problem in corporate communications using a real-life case. Later projects will ask you to understand how to communicate to non-expert audiences, design a set of instructions, communicate with a global audience, and write a proposal. After doing these projects, you will know how to

- Communicate to outside audiences in a professional manner and style
- Write and design business documents, such as memos and professional letters
- Work cooperatively in a team setting with shared goals

Ultimately, the goal for this course is to help you be a successful communicator in your future career path. But before we get into each chapter, which focuses on a specific project for the course, you need to understand what makes up professional communication as related to the technical professions.

Overview of Professional and Technical Writing

Jessica Jorgenson Borchert

Professional and Technical Writing: An Overview

Professional writing refers to writing that takes place in a business or other professional setting. In essence, professional writing describes all workplace writing. Much of professional writing can be identified as business writing. Business writing is writing done to external or internal audiences. A memo, for instance, is always a document written to an internal audience. A letter, on the other hand, is often written to external audiences. Technical writing falls under the umbrella of professional writing, but typically uses a bit more precision in terms of tone, syntax, and diction than business writing, which at times can carry an informal tone. Technical writing refers to writing that requires specific instruction, definition, or explanation that is commonly needed in technical fields. For example, the writing in a car manual is a form of technical writing because it gives instructions and identifies key terms regarding vehicle ownership. It is also important to note that technical writing is often written toward general audiences because you are trying to teach someone how to do something or explain something.

to them. You would not need to write the same documentation to someone else in your specific field, as they should already understand how to do the process you are describing.

Technical writing does not just include instructions, however. Technical communication is all around. If you consider technology as anything that applies scientific findings, then you will start seeing it everywhere. While high technology like smart phones is becoming ubiquitous, low technology has been around since humans began crafting utensils. Because technologies are created in certain contexts and often distributed to much wider contexts, it is important for their creators and advocates to communicate a product's intended use to prevent mishandling and also to promote ethical distribution. Technical writing might be the prescription written on the inside of frame of your eyewear, the label inside your shirt, or the caution sign outside of a construction site.

What kinds of texts exist in professional and technical writing?

Any text that serves to communicate information about how to use a technology is considered technical communication. Meanwhile, any text circulating in professional settings for the purpose of getting work done is considered professional communication.

Texts within professional environments are often called “deliverables” because they deliver the research and information in tangible artifacts (and usually in common genres) such as internal memos, reports, proposals, presentations, etc. To understand which text is most appropriate for a certain task, writers need to consider concepts of rhetoric like audience and contextual analysis as well as design principles.

Isn't professional and technical writing just straightforward writing?

Yes and no. It is important to realize that there are often values and tones that are not explicitly stated in any piece of

communication. Knowing what these not clearly stated values and ideas are is part of understanding rhetoric, which will be described in the next chapter. You must always remember that bias exists in all communication. As a reader and a writer, it is your job to be aware of your own biases, as well as the biases of your audience, or your readers. Writing is always also situated, meaning it is created for a particular context, place, and time and so it carries with it the values and culture of that place and time. A way to better understand this is to think about things you would tell your professor as compared to things you would tell your best friend. You would likely tell your best friend about the events of a college party you attended the other night, but you likely would not confess all these details to your professor. This is an example of how communication is situated and carries with it biases because you choose what information to share and withhold based on your audience. In other words, the relationship between the writer and the audience influences who has access to the information.

I am in a technical field, but not necessarily a technical communicator. Why do I need to know technical and professional writing?

You will likely find yourself working in a collaborative environment. Within this environment, you will have to communicate with fellow employees, clients, and customers. Because of the wide array of audiences, you will have to communicate with, you have to understand concepts of professional and technical writing.

Because you will likely work in a collaborative environment, documents, particularly for external audiences, will be produced and/or approved by a team. Multiple moving parts means that learning skills in working within groups and staying organized are important for getting and maintaining a career within an organization. Whether you are an automotive technician, a business consultant, a mechanical engineer, or a technical analyst, you will need to understand good communication practices. These environments often include

people from all sorts of different backgrounds, cultures, and ideas. Avoid unnecessary and time-consuming conflict by approaching projects with an open mind and with an awareness of your own biases, which might be different from not only those of your readers but also of your colleagues.

Collaboration tactics like project management will also benefit you. Currently, much technical writing happens through remote work, and as such, professional writers often work for multiple clients concurrently. In fact, one can make a pretty good living by working from home on a number of contracted or part-time jobs, but to be successful means to constantly balance tasks by developing a system for organizing them. Gaining multitasking capabilities will transfer to any job where you're required to report to different stakeholders about the same or similar projects.

Because of the collaborative nature of this work as well as the natural process of writing, document review and revision are integral parts of producing written communication.

Is this all just about writing?

No. A portion of professional and technical communication includes understanding how to design a document for the intended audience. Design is a component of this course that will be covered in a separate set of documents and in class, but note design is an important concept to cover because design and content are complementary considerations. Sometimes, space limitations will mean that the writing needs to be extremely concise and stripped of all detail. On the other hand, sometimes it's important for legal or other reasons to include a lot of information, no matter how much space it takes up. In either case, writers must consider their purpose and audience.

When considering purpose with design, you have to know how much content is needed to relay the specific meaning of the text. If creating a set of instructions, for example, creating visuals for illustrating each step of the process will be important to your audience who likely does not know how to that task. In this case, incorporating enough design to illustrate each step will be key.

Space isn't the only limitation that determines design and content. Writers have to consider audience values, the rhetorical situation they are in, and institutional constraints like cost and formatting, as well as accessibility. Different audiences will have different interpretations of texts based on their culture, priorities, and relationship to the topic. Therefore, before beginning the task of writing, the composition process requires writers to consider for whom they are writing. In the workplace, there are often two audiences: internal, or inter-organizational, and external, which is often the public. Sometimes, internal documents end up in external venues (and vice-versa), particularly with the proliferation of social media, so it's important for professional communicators to consider potential secondary audiences.



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Questions for Reflection

1. What experiences have you had as a professional or technical communicator?
2. How do you envision this course being helpful to you?
3. Describe one way I can help you learn as your teacher of this course.

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[PART I]

CHAPTER 1: Rhetoric and the Rhetorical Situation

Learning Objectives

- Describe what is meant by the term rhetoric
- Articulate the rhetorical situation of audience, purpose, context, and genre.
- Apply the rhetorical situation to professional communication situations.

Rhetoric and the Rhetorical Situation

Take a moment to think about your understanding of the word “rhetoric.” Many of you have likely heard this term used by politicians and, depending upon the context for using the term rhetoric, you may think of the term through negative connotations. Rhetoric, however, is a much more neutral term. Rhetoric, most simply defined, refers to finding the best means of communication for the given situation.

To create an effective use of rhetoric, one only needs to look at the rhetorical situation. Writing professionals use the term rhetorical situation to describe any situation where at least one individual is using some form of communication to modify the perspective of another person. Because of the emphasis on modifying the perspective of another, some will describe rhetoric as a means of using “trickery,” but rhetoric is just meant to accomplish effective communication within a given situation where someone wants to persuade, inform, or appeal to emotion. In other words, using rhetoric effectively serves as a means of persuasion. If you want to send a message to your friend about where you are meeting up, you may send a text message. It’s a quick, easy, and accessible way to let your friend know where you are meeting. You also know enough about your friend to realize that person would have their phone with them. Understanding that the text message was the best way to alert your friend about where you are all meeting is an example of understanding rhetoric within that specific situation.

To better break down the rhetorical concept, one only needs to look at the rhetorical situation. In every communication situation, we deal with a number of identifiers. In essence, you can think of this almost like a math equation or blanks to be filled. In order to analyze any act of communication, you need to answer the following questions:

- What are the goals of the writer? Why is the writer writing about the subject? What is the writer seeking from the audience?
- Who is the audience, meaning who are you speaking or writing to?
- What is the context for the communication? In other words, where is this communicative act occurring?
- What is the purpose for the communication? Why is it that you are communicating?
- What is the best way to share this communication or to engage in this communication? Genre refers to how is this communication presented to the audience? For example, do you think you need to meet in person? Is sending an email

appropriate? When you identify the best way to communicate, you are choosing a genre. A genre refers to a type of social action one takes when communicating, or more specifically refers to a type of document you create or engage in for the act of communication. An example of a written genre may be an email, letter, or text message. We identify these objects as genres because each writing artifact has its own characteristics. For example, an email always includes information about who the email is to, from, and a subject line. Emails are also typically short messages whereas letters tend to be longer. With these characteristics, one can learn to identify what an email looks like and how it differs from a letter.

The next sections will take a look at all the above components in the rhetorical situation more closely to help you understand what questions to ask for each component. These questions will help you to analyze a specific communication act and apply that understanding to a sample scenario located at the end of this chapter. See figure 1: The Rhetorical Situation for a visual representation of these concepts.



Figure 1: The Rhetorical Situation

Source: "Rhetorical Situation" Open English @ SLCC. n.d.

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The Rhetorical Situation: Writer

Writer refers to the person, or occasionally people, that are communicating. It is important to note that any time you communicate in a professional setting, you are not only communicating as an individual, but also on behalf of your company or organization. When considering the writer's perspective, both purpose (which will be described more fully below) and exigence matter. Exigence refers to why the writer is writing about the subject. Remember when someone communicates, they bring their own knowledge and values into

that communication, even if those values and experiences are not clearly stated. This means it is even more important for a writer, in a professional setting, to carefully edit their work not only for errors, but also for tone. Tone is often expressed through syntax, point of view, and word choice as it represents the attitudes the writer holds. Through tone, you can easily tell if a communication is meant to be read as a problem that needs to be resolved now, or simply something that states a fact. When writing professionally, it is important to pay attention to tone. Often you want to write in less complex sentences, use clear language and avoid colloquialisms or clichés that may be misunderstood, and keep a consistent point of view.

The Rhetorical Situation: Audience

Audience refers to the person or people you are communicating with. An audience could be anyone, from someone you know personally to a client you have never met and only communicate with through phone calls and email. To communicate well, knowing your audience is of great importance. To learn what you need about your audience, there are certain considerations you need to make. For example, what do you know about the person you will be communicating with? Do you know anything about what they value? Sometimes the location of where the person lives can build a sense of connection with that audience. Other times you rely on the culture of the company that person is employed at. Either way, when considering a communicative act, you need to have an understanding of whom you are communicating with. For example, you would not want to use jargon from your specific field of expertise with someone who may just be an administrative specialist at a company as that person would likely not understand some of your terminology. Knowing your

audience helps you know how to speak with that individual or group of people.

The Rhetorical Situation: Context

For many, context can be the most difficult part of the rhetorical situation to understand. What is context? You may have heard someone say, “you have taken that out of context.” What they mean is that you have taken something someone did, said, or felt and applied it to a situation where that comment or action did not apply or was not relevant. This means that you took something out of context. Context simply refers to where a communication takes place, but may also refer to how language can help determine meaning. For example, you would not write a cover letter in the same way you would write a text message to a friend. You likely may use more colloquial or shortened phrases in a text message whereas in the cover letter you will use more formal language. Context also refers to what factors influence a particular communication.

The Rhetorical Situation: Purpose and Subject

Purpose is the reason for the communication that is occurring. The purpose of a piece of writing could be to inform, persuade, or share an emotional appeal. In professional communication, the purpose of a piece of writing is often clearly stated in the

first sentence or in the first paragraph of a document. The subject of the writing is closely linked to the purpose. For example, the subject could be to share information on an increase in the price of a monthly subscription to a customer. The purpose would be to inform that customer of the change, but also persuade them that the change in price benefits the customer in some way.

The Rhetorical Situation: Genre

Genre refers to the type of text that is produced within a particular communication and how that text is presented to the audience. Genre can be simplified to mean the type of document that is produced. For example, an email is a genre because when we see it we immediately recognize it is an email in how it is sent electronically, is typically seen as a short communication, and includes a subject line. When you normally think of the term genre, you may think of music or movies. However, this term exists in many different areas, and within writing studies, genre refers to a type of document that is produced by a writer for an audience.

[1]

Section 1.1: Scenario: Rhetoric in the Job Search

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Sample scenario: Rhetorical Situation of Applying for a Job

To give an example of the rhetorical situation, let's analyze the rhetorical situation for the particular context of applying for a job. As an applicant, you create two genres, a resume and a cover letter, for the purpose of sharing your qualifications and experience, with special attention toward how your skills compliment the job for which you are applying. Both the cover letter and resume highlights your skills, but does so in different ways. A resume functions merely to list your education, experience, and other qualifications. A resume is simply a list of facts about you. A cover letter's purpose is to focus in on some of those facts to highlight them telling a particular story about your education and experience. These stories will highlight to your potential employer, in this case your audience, how and why you would be a good fit for the particular position you are applying for.

Of course, to write your cover letter and resume effectively you need to also do some research on the employer, location, and the position for which you are applying. This means that as the applicant you will have to survey the company website, if applicable, to learn more about the employer's values and mission. Then you have to consider how you can enrich those values and mission using your experience and skills. You also need to find out information about the area in which the job is located, further persuading the employer you would also be an asset within that particular community and location. Finally, you will have to convince the employer you are the best fit for that position. What in your experience and education makes you a good fit for the job? What can you bring into that position that may be new or help the company to move forward? Remember that the cover letter is not just about you as an applicant, but also about how you can help that potential employer be successful in the future.

[2]

Section 1.2: Video for The Rhetorical Situation

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<https://technicalandprofessionalcommunication.pressbooks.com/?p=44>

[3]

Section 1.3 Questions for Reflection

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Questions for Reflection

1. Describe rhetoric. What is the rhetorical situation?
2. How do you see rhetoric being important for your field of study?
3. Considering the discussion of rhetoric above, do you think any form of unbiased communication occurs?

[PART II]

CHAPTER 2: Genres in Technical and Professional Writing

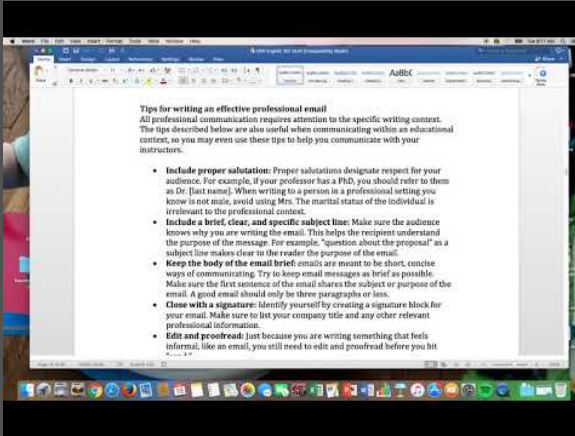
Learning Objectives

- Understand different types of professional and business correspondence.
- Identify which genre (letter, memo, or email) may best fit a particular professional context.
- Understand the role of the professional uses of social media.

Introduction

In the previous chapter, I introduced the concept of genre. Remember genre refers to a type, and so in the context of professional and technical writing, genre refers to a type of document. An example of a specific genre would be an email. In professional and technical communication a wide array of genres exist. This chapter will go through some common genres used in professional and technical communication, with

particular attention made to genres you will compose in this course.



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[4]

Section 2.1 Business Letters

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Business Letter

A formal professional letter, or business letter, is a letter written in a formal writing style and often used for correspondence between an organization and a customer or client. Correspondence includes all communication shared between a business entity and consumers or clients. Formal language refers to language that is professional in tone and does not contain clichés or colloquialisms. It is important to remember that a business letter is a legal document between the interested parties. These documents can be held up for seven years, so it is important all business letters contain validated information.

When to use a business letter

Business letters contain factual information and are meant to be legal documents. Situations that best fit a business letter may include situations that involve sharing information with others

who are outside of the company. Customers, shareholders, or clients would all be appropriate audiences for a business letter.

While business letters are still used, email has become a more common way of communicating with clients, customers, and others outside of the internal business environment. Despite this, companies will still send out business letters, particularly when the information the company is presenting needs to be secure or includes other sensitive information.

Formatting a Business Letter

- Use single spacing, never double space a business letter
- Use a font that is easy to read
- Block paragraph. Leave a line of space between each paragraph.
- Include address of sender and recipient at top of the document with the date separating the two addresses. The address for the sender is always listed first, as the header.
- Begin your letter with a greeting (e.g. Dear Mr. Smith)
- The introduction introduces the purpose for the letter. Include a statement in the introduction showing you are knowledgeable of the audience to which your letter is directed.
- The body of the letter provides background history of the situation and shares key points. You will also list any important details in the body of the letter, and asks questions if they are necessary.
- The conclusion should summarize key points from the letter and include any deadlines. Contact information is also shared in the conclusion.
- End with a closing salutation (e.g. kind regards, sincerely)
- Business letters often include enclosures. List any enclosures you have one line below the closing.
- Proofread and edit your business letter carefully.

Be aware that when writing a professional letter company letterhead should be used. You should also use any other formatting or design that is used by the company for which you are communicating.

[5]

Section 2.2 Memorandums

Jessica Jorgenson Borchert

Memorandums

A memo is an internal document transmitted to others within a company or corporate setting. Because memos are written internally, it is important to use company letterhead and any other company-related formatting your employer uses. Most companies have a set format for hard copy and electronic memos. Memos are always shorter documents, and contain factual information, so make sure to proofread these documents carefully.

When to use a memo

Only use memos when you are communicating information internally, within the confines of the company. Occasionally, memos may be external, but these occurrences are often reserved for areas of government or information shared with parties that are closely related to an issue of business regarding

the company. Use memos for internal communication about organizational procedures and changes.

Formatting a memo

- Make sure to follow the format and style of the company
- Single space and block paragraph all memos
- Include To, From, Date, and Subject lines at the top of the memo
- Use a CC line when indicating someone other than the recipient receives a copy of the memo
- Make sure to separate items linked together in list format. Use bullet points for any lists.
- You may also list facts or figures in columns within a table. A table should be properly formatted with the title above the table and shown as the following: Table 1: Title of Table.
- If you are using images in a memo or a letter, make sure to label these as figures. You can see samples of labeled figures within this text, but just like tables figures are also numbered with appropriate titles.

The sample memo below gives a visual example of a memo.

To: Netflix Employees

From: Andrew Guest

Date: September 20, 2016

Subject: Netflix Price Changes

As you know, there has been a change in the prices of the Netflix services as well as a separation of the DVD and streaming services. We are changing the Netflix Company for the better and we would like our employees to see the benefits of the changes as well as recognize the growth of the company.

The Plan

We need to help bring confidence back to our customers and show the growth potential of the Netflix streaming and DVD services. We as a company need to reinsure our customers and bring the potential of Netflix to its maximum.

Management Positions

Figure 3: Sample Memo

[6]

Section 2.3 Email

Jessica Jorgenson Borchert

Electronic Mail (E-mail or email)

Email serves as one of our most familiar forms of communication as it is one of the ways we communicate in professional and personal settings each day. Part of the reason for the wide uses of email is due to how it can be used like text, synchronous chat, and it can be delivered to a cell phone. In business, email has largely replaced print hard copy letters for external communication. E-mail can be very useful for messages that have slightly more content than a text message, but it is still best used for fairly brief messages.

When to use email

Email serves as a popular genre for many types of different communication within a professional context. Many businesses use automated e-mails to acknowledge communications from the public, or to remind associates that periodic reports or

payments are due. You may also be assigned to “populate” a form e-mail in which standard paragraphs are used, but you choose from a menu of sentences to make the wording suitable for a particular transaction. You may also regularly email collaborators or clients regarding daily business tasks.

One of the biggest concerns of many employees is how to write an email in a professional manner. Below will list some tips for writing a professional email along with going over a sample email.

Tips for writing an effective professional email

All professional communication requires attention to the specific writing context. The tips described below are also useful when communicating within an educational context, so you may even use these tips to help you communicate with your instructors.

- **Include proper salutation:** Proper salutations designate respect for your audience. For example, if your professor has a PhD, you should refer to them as Dr. [last name]. When writing to a person in a professional setting you know is not male, avoid using Mrs. The marital status of the individual is irrelevant to the professional context.
- **Include a brief, clear, and specific subject line:** Make sure the audience knows why you are writing the email. This helps the recipient understand the purpose of the message. For example, “question about the proposal” as a subject line makes clear to the reader the purpose of the email.
- **Keep the body of the email brief:** emails are meant to be short, concise ways of communicating. Try to keep email messages as brief as possible. Make sure the first sentence of the email shares the subject or purpose of the email. A good email should only be three paragraphs or less.
- **Close with a signature:** Identify yourself by creating a signature block for your email. Make sure to list your

company title and any other relevant professional information.

- **Edit and proofread:**Just because you are writing something that feels informal, like an email, you still need to edit and proofread before you hit “send.”
- **Never use all caps:**All caps can be difficult to read for many people. All caps also may make your message appear as if you are angry or trying to emphasize every word in the message.
- **Large files? Email early:**If you have to send a large file, such as a proposal or other larger document, email your attachment as early as you can. Realize it will take your recipient time to read your attached document.
- **Reply promptly:**Email is meant to be a quicker way to communicate, so it is important you respond promptly. A good rule of thumb for most people is to respond to an email within 48 or 72 hours.
- **Never send an emotional response:** Even though email is meant to be responded to promptly, never send out an angry or emotional response. If you feel emotional about an email, give it some time before you respond. You could even send a message stating that you will respond within a particular length of time.
- **Use reply-all sparingly:**Do not send your email to everyone who originally received the email unless it is information that should be shared with everyone.
- **Give feedback or follow-up:**Allow time for follow up, but if you do not receive a response in a couple days it may be all right to call the recipient. Messages may be placed in a Spam folder by mistake.

[7]

Section 2.4 Social Media

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Social Media Use in Professional Contexts

Social media, like Facebook, Twitter, and Instagram, has changed how companies make an impact. Customers can leave feedback about an experience with a company through social media by leaving reviews or comments. Companies can post product updates and other information through their social media accounts. All this gives both the business and the consumer a sense of having direct, and immediate, access to one another. Such direct access requires an employee to be an ethical digital communicator.

Digital Ethics

No set of rules exists for how to conduct oneself in digital environments, but even with this there are conventions to consider when communicating in digital environments. It is useful to think of ethics as the appropriate actions for relating to others in a given environment. Guidance or governance for

effective online communication exists only through general patterns of experiences that accumulate over time. For example, beginning emails with a respectful salutation or filtering images you are tagged in on Facebook are not examples of following rules that are inherently true; instead, beginning emails with a respectful salutation or filtering images you are tagged in on Facebook are useful conventions of digital ethics to abide by because of the patterns of responses to rude emails or inappropriate online photo albums: a lack of response and a lack of a job, respectively. Instead of simply memorizing a set of rules regarding digital ethics, it is more important to consider the rhetorical situation in which you are communicating (see Chapter 1 for a review of the rhetorical situation).

One of the most immediate reasons why digital ethics are important is because how we construct our digital selves affects the way in which our communication and intentions will be received. The notion that individual ethics impact our arguments is nothing new. Much of how we understand and categorize argumentation today stems from Aristotle's appeals of logic, emotion, and credibility in relation to the arguments we make. The appeals are generally understood as the means of persuasion, or the idea of how we support our arguments for specific audiences. In Aristotle's *Rhetoric*, there are three overarching appeals used to classify how we argue: logic (*logos*), emotion (*pathos*), and the character of the speaker (*ethos*). (For further information about these rhetorical appeals, see "Rhetorical Appeals.") These appeals are not represented hierarchically as Aristotle penned that the most articulate, effective communicators successfully weaved elements of all three appeals into their arguments.

An important part of maintaining a solid digital ethos is critically reflecting on your choices of online self-representation and whether or not these choices reflect your goals as a student and as a professional. If your goal is to get a job after graduation, you need to pay attention to the artifacts of language you produce. Your résumé constitutes the logical proofs of your claim, while your cover letter may engage in

altering the employer's emotional disposition. If the employer wants to see who you are as a person, and whether or not they might want to interact with you on a daily basis for a lengthy period of time, they might want to know more about your character. Social media sites often reveal meaningful insights into a person's character; and, if online self-presentation is a core component to rhetoric, then how well will your arguments stand?

[8]

Section 2.5 Questions for Reflection

Jessica Jorgenson Borchert

Questions for Reflection

1. When might a business letter be used in professional communication? When might a memo be the best genre of communication to use?
2. What are three tips for writing a professional email? Why do you think these tips are of particularly important?
3. What are some consequences of maintaining a poor digital ethos?

[PART III]

CHAPTER 3: Developing Professional Writing with Ethics and Structure

Learning Objectives

- Learn the meaning of a formal sentence definition and extended definition, as well as how to write each type of definition.
- Know how to communicate with non-experts about their specific terms and processes in their field of expertise.
- Articulate different methods of development in writing styles.

Composing with Professionalism

The next sections will discuss ways you can ensure you are composing with professionalism in mind. The first section will discuss active and passive voice, and when to use each. The you viewpoint will also be briefly discussed, which is helpful in understanding ways of communicating potentially bad news.

A section on maintain a positive, professional tone will also be included. Finally, a section of writing ethically will be shared to help you consider what it means to be an ethical communicator in a culture where we sometimes comment before we think through how our comment may be received by others.

Why do you need to know about extended definitions?

- An important writing tool you'll need, particularly if you are writing for non-specialists, is definition--or more specifically, extended definition.
- An *extended definition* is a one or more paragraphs that attempt to explain a complex term. Some terms may be so important in your report, there may be so much confusion about them, or they may be so difficult to understand that an extended discussion is vital for the success of your report.



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You can view it online here:

<https://technicalandprofessionalcommunication.pressbooks.com/?p=34>

Active Voice and Passive Voice

In Chapter 2, I mentioned the importance of using a formal writing style when composing documents in professional contexts. Formal writing style is a style of writing reserved for professional genres, such as memos, business letters, and reports. Formal writing style uses the active voice meaning the

subject of the sentence performs the action. Formal writing style also requires that the writing is clear and concrete, so never use vague language or flowery descriptions. You also want to keep your writing as concise as possible, so include only the most relevant details to the situation. A final rule to remember about formal language is to avoid using abbreviations as your audience may not know what the abbreviation stands for.

For an illustration of active voice, see the two sentences below. Which sentence would you rather read?

1. All sales orders are processed daily by Burton.
2. Burton processes all sales orders daily.

Most readers prefer sentence 2, but why? You may remember from high school or college English that all sentences have a subject and a verb, but you may not have paid much attention to their functions. Let's look at how the subject and verb function in these two sentences. In sentence 1, the subject is "Burton," and the subject is the doer of the action expressed by the verb (processes). In sentence 2, the subject is "sales orders," and the subject is the receiver of the action expressed by the verb (are processed). Sentence 1 is written in active voice, meaning the sentence is structured in a way where the subject carries out the action. Sentence 2 is written in passive voice, meaning the sentence is structured in a way where the subject receives the action.

Active sentences tend to be shorter, more precise, and easier to understand. This is especially true because passive sentences can be written in ways that do not tell the reader who the doer of the action is. For example, "All sales orders are processed daily" is a complete and correct sentence in passive voice.

Active voice is the clear choice for a variety of contexts, but not all. When you want to deemphasize the doer of the action, you may write, "Ten late arrivals were recorded this month" and not even mention who was late. The passive form doesn't place blame or credit, so it can be more diplomatic in some contexts. Passive voice allows the writer to avoid personal references or personal pronouns (he, she, they) to create a more objective tone. There are also situations where the doer of the action is

unknown, as in “graffiti was painted on the side of our building last night.”

Overall, business communication resources tend to recommend active voice as the preferred style. Still, the styles themselves are not the problem or challenge, but it is how we use them that matters. A skilled business writer will see both styles as options within a range of choices and learn to distinguish when each style is most appropriate to facilitate communication. (citation: <http://open.lib.umn.edu/businesscommunication/chapter/6-2-writing-style/>)4.0 CC

The You Viewpoint

The you viewpoint is a way of writing so that the reader’s interest and perspective are foremost. The you viewpoint is based on the principle that most readers are naturally more concerned about their own needs than they are about those of a writer or of a business.

The you viewpoint often, but not always, means using the words of you and your rather than we, I, or mine. Below is an example that illustrates why using the you viewpoint is important.

1. We must receive your signed approval before we can process your refund.
2. So you can receive your refund promptly, please send your signed approval.

Note how in sentence 2 the benefit to the reader is stressed, so the reader is more likely to act on behalf of the writer.

Tone

One important thing to remember when communicating in professional contexts is to maintain a professional, positive

tone. Keeping a positive tone will help you to maintain goodwill with all parties you are in communication with. In order to engage in a positive tone, you may want to avoid using pronouns entirely and so with this the you viewpoint may not be useful. If you use the you viewpoint in some situations, you may sound accusatory to your reader. The sample sentences below give an illustration of this accusatory tone.

1. Accusatory tone: Your budget makes no allowance for consulting costs.
2. Positive tone: The budget should include an allowance for consulting costs to meet all the concerns of the client.

You can see how sentence 2 better achieves the purposes of communicating with your audience as the sentence does not blame the audience, but instead simply states in neutral terms what a budget should include.

Communicating Ethically

As you consider ethical communication within workplace contexts, make sure to think about the following:

- The code of ethics within your field
- The code of ethics followed by your employer, and
- Your own personal code of ethics

Once you are on the job, you will be asked to create many documents during your professional career. Some writing you do may be daily tasks or simple and straightforward documents. Other writing tasks may be more complex and require research or navigating difficult professional situations. In all of these contexts, understand that it is important to never mislead

someone or a company, misrepresent information, or stereotype.

Misleading can mean multiple things when writing in professional contexts. In one scenario, do not mislead simply refers to not misleading with facts or other information. Facts must be presented clearly and effectively. Be cautious when using figures, charts and tables, making sure they are not misleading. While this may seem easy to read about, when the pressure is on and there are deadlines to meet, taking shortcuts and stretching the truth are very common.

A less common form of misleading is through plagiarism. You may think of plagiarism within educational contexts, but the truth is plagiarism can happen anywhere, even in business environments. Plagiarizing is misrepresenting the source or facts, most commonly when you claim the ideas you are writing about are yours. When you are researching professional documents, make sure you are using material with permission and that you are also correctly citing all sources of that information. If you are writing about what you've researched, make sure you are citing the sources of your information and giving credit to all the necessary researchers.

You also need to be aware of laws regarding intellectual property. Intellectual property includes patents, or items whose credit for creation is protected; trademarks, meaning company names, logos, or slogans; and copyright, which are items whose distribution is protected by law. None of these things can be used without proper recognition or approval of the company or creator.

You also want to be careful not to manipulate. If you are holding a professional job, it is understood that you have a decent ability to write persuasively. Do not use your ability to persuade people to do what is not in their best interest. A good writer with a bad motive can twist words to make something sound like it is beneficial to all audiences. The audience may find out too late that what you wrote only benefited you and actual ended up hurting them. In the end, this kind of behavior will only hurt your professional reputation and may even cost you a job, or even your career in extreme cases.

Finally, when communicating ethically in professional

contexts, you want to avoid stereotyping. Most stereotyping takes place subconsciously. Remember that all workplaces have anti-discrimination policies, so make sure you understand these policies and know what behaviors may be counterintuitive to such policies. A good rule of thumb is to always have a co-worker proofread your documents just in case you may have written something that goes against a particular policy or code of ethics.

How to address unethical practices

You now know some ways to communicate ethically, but you likely also will find yourself in a situation where you may have to address unethical practices in the workplace. Addressing unethical situations is not easy, and often requires that you perform the following tasks for addressing an unethical situation:

1. **Ask questions:** While this action sounds simple, asking questions serves as an effective way of getting attention on an unethical practice. Ask questions about who certain decisions are affecting and how those individuals or groups are affected by those decisions. Ask why particular decisions were made. Asking these types of questions will help to not put you on the spot, but help to show that you are concerned about the decision making that was involved in a particular situation or process.
2. **Use facts and reason:** Avoid accusations. Instead focus on the facts of the situation and the reasons decisions were made. Before you react to a situation you believe is unethical, learn as many facts about the situation and know the reasons for making those decisions. If you base your thoughts around a situation on the facts of the case, you

will be seen as someone who has considered the situation seriously and the company will likely take your opinions seriously.

3. **Remain open to other ideas:** You want to use the ideas of others in your approach to a solution. People often have different ethical values, so you want to use the ideas of others as well as consider your own ideas. Doing this will help you be more ethical in the overall approach you take.

Hopefully any unethical situation you come into contact with will be easy to manage. You may have to work with extremely difficult, and timely, ethical concerns. Keeping the ideas presented above in mind when you encounter these challenges will help your job, and your career, progress more smoothly.

[9]

Section 3.1 Methods of Development

Jessica Jorgenson Borchert

Methods of Development

After looking at ways of writing with tone, style, and ethics in mind, looking at ways to logically develop a document you write is also useful. As discussed with genre, each document has its own shape and structure. For example, we know what an email looks like because of its inherent structure. Next, we need to discuss ways of creating a logical method of development in each text you compose. Note that having a logical method of development for any writing you do will help your reader. This also helps you as it helps you move seamlessly from one idea to another.

You probably already know that most written documents have some type of introduction and a conclusion at the end. This still holds true, but there are various methods of developing a structure to the body of your writing. The list below will describe different methods of development that will help you as you take on various writing opportunities.

Cause and Effect method of development

If you are writing about a solution to a problem, a cause and effect method of development may work best for your document. Start with either the cause or the effect of the event. This approach can help develop a report that offers a solution to a problem, beginning with the problem and moving onto the solution or you may begin with the solution and then describe the problem.

Chronological method of development

If your writing needs to focus on time or sequence, then you would use a chronological method of development. For example, if you have to write an incident report (a report that focuses on an accident in the workplace), you would trace the events as they occurred in time.

Division and classification method of development

This can be a useful method of development if you are describing a technical mechanism, product, or process. To use division and classification, your document separates the whole into component parts and discusses each part separately (division) or groups parts into categories that clarify the relationship of the parts (classification).

General and specific methods of development

If you want to proceed either from general information to specific details or from specific information to general conclusions, you use a general to specific method of development. For example, most college essays, especially essays in freshman courses, use this type of development.

Order of Importance method of development

If your document needs to present information in either decreasing order of importance, as in a report that starts with the most important point, or increasing order of importance, as in a presentation that ends with the most important point.

Sequential method of development

If your document needs to emphasize the order of elements in a particular process, like you do with step-by-step instructions, then you use a sequential method of development.

Spatial method of development

A spatial method of development is useful to describe the

physical appearance of an object or area from top to bottom, inside to outside, front to back, and so on.

Definition method of development

Extends the definition of an object or mechanism with additional details, examples, comparisons, or other exploratory devices.

Rarely will you choose just one method of development. Documents often use a blending of different methods of development. For example, in a proposal that describes the organization of a company, you might use elements from three methods of development. You could divide the larger topic, which is the company, into operations using division and classification and arrange the operations according to what you see as their impact on the company in using order of importance. If you wanted to present manufacturing operations in the order they occur, you would be using a sequential method of development. In other words, do not think a document includes just one of these methods and so when you create your own documents you need to keep this in mind.

[10]

Section 3.2: Extended, Brief, and Formal Definitions

Jessica Jorgenson Borchert

Communicating with Non-Specialist Audiences

The ability to explain complex, technical matters with ease and simplicity so that a non-specialist audience understands is one of the most important skills you can develop within a technical field. This ability to “translate” difficult-to-read technical discussions is important because so much of technical writing is aimed at non-specialist audiences. These audiences include important people such as supervisors, executives, investors, financial officers, government officials, and, of course, customers.

In writing environments, there are a number of ways to communicate specialized knowledge to non-specialist audiences. A way we will focus on doing this in one of our projects are through formal sentence definitions and extended definitions.

Extended, Formal, and Brief Definitions

When I described the definition method of development, I noted that there were many ways you could give a definition, such as through comparisons or examples. When you give a definition through a comparison or example, you are giving an example of an extended definition. Many types of extended definitions exist, and they help you to explain terms or jargon within your field to a non-expert audience. A list of different types of extended definitions is below. An example of the definition is included for each listed type of extended definition. Be aware that what you see below is not a comprehensive listing of different types of extended definitions you may use.

History

Rutherford Backscattering Spectroscopy was named after Ernest Rutherford, the Nobel Laureate in physics, whose early 20th century experiments in bombarding atoms of various materials with x-rays revealed the structure of the nucleus. As knowledge of the atom advanced, this procedure evolved into an excellent method of measuring the composition of objects without destroying them. Today this method is even used by art historians to analyze paintings and sculpture.

Word Derivation

Diastrophism is derived from the Greek word *diastrophē*, whose root meaning is “to turn through.” Thus, diastrophism appropriately names the phenomenon of “turning through,” or deformation, of the earth’s crust that created oceans and mountains.

Contrast

Land treatment should not be confused with landfiling. In land treatment, refinery wastes are spread in a thin layer onto a designated plot of land. These wastes are then cultivated into the soil, where they are broken down and immobilized by soil organisms. Landfiling, on the other hand, is the storage of wastes in a constructed or natural excavation.

Basic Principle

Distillation processes make use of the principle that different liquids will vaporize at different temperatures. That principle

allows one liquid to be separated from another by applying heat at the boiling temperature of the desired liquid.

Process Stages

Aeration-by-Turning consists of two stages: 1) tearing down the existing windrow, separating the internal and external layers; 2) rebuilding the windrow so that the internal layer becomes the external layer.

Comparison

A generic peristaltic pump is similar to other pumps you have used, but it contains additional controls to permit use of slow-pumping.

Simile

The action of a semi-rigid joint is similar to what occurs when you pull on a door with rusty hinges. Because of the friction created by the rust, some of the movement of the swinging door is transferred through the hinges to the wall.

Composition

Natural black chalk is a composite of carbon and clay, and is also known as carbonaceous shale. The carbon provides the color; the clay acts as the binder.

Negation

Raw data is not “information”; data only becomes information after it has been evaluated, interpreted, and applied.

Formal sentence definition

A way to explain a term to a non-expert audience is through a formal sentence definition, which includes the term that is being defined, the class or group that term belongs to, and distinguishing characteristics of that term. Formal Sentence Definitions below gives a number of examples for formal sentence definitions.

Term defined (bold)	Class to which the term belongs (blue)
An algorithm is a finite description of a finite number of steps required to accomplish some well-defined task.	
Carbohydrates are a food group including sugars, starches, and cellulose.	
Computer memory is one of three basic components of a computer which stores information for future use—both the data that will be operated on as well as the programs that direct the operations to be performed.	
Reservoir rock is that type of rock that has sufficient porosity and permeability to allow gas and oil to accumulate and be produced in commercial quantities.	
Influenza is an acute highly contagious infection of the respiratory tract, which occurs sporadically or in epidemics and that lasts up to a month.	
Characteristics: details about the term that distinguish it from other members of the class (red)	

Formal Sentence Definitions

Source: David McMurrey, Extended Definitions, “Writing Formal Sentence Definitions,” n.d.

<https://www.prismnet.com/~hcexres/textbook/def.html> CC-BY 4.0

Brief Definitions

Use brief definitions when you want to include a quick definition of a single word or phrase in order to better help communicate your message to your audience. You may use dashes, commas, or parentheses to create brief definitions.

Dashes

- It was an effervescent—or bubbling—mixture.
- He was suffering from hypertension—a chronic medical condition

Commas

- It was an effervescent, or bubbling, mixture.

- He was suffering from hypertension, or high blood pressure.

Parentheses

- It was an effervescent (bubbling) mixture.
- He was suffering from hypertension (a chronic medical condition)

Dashes create the most emphasis on the brief definition, while parentheses create the least emphasis on the brief definition. In fact, many readers will skip text if you place it between parentheses. Commas offer a happy medium in terms of emphasis. You will want to consider your audience and writing situation in choosing what method to use.

The process of supplying short definitions quickly is important for communicating with non-specialist audiences. In professional and technical writing environments, you may spend most of your time communicating with those who are not specialists in your field. Brief definitions, formal sentence definitions, and extended definitions all serve as ways you can communicate specialized information to non-expert audiences.

[11]

Section 3.3 Questions for Reflection

Jessica Jorgenson Borchert

Questions for Reflection

1. When might the “you viewpoint” be useful to use in a professional context?
2. Name one method of development and describe a communication situation that would call for the method of development you described.
3. Briefly describe a formal sentence definition and an extended definition. Why are such modes of communication helpful in a professional context?

[PART IV]

CHAPTER 4: Writing Instructions

Learning Objectives

- Describe why writing concise, clear instructions are important in technical fields
- Know the importance of writing concise, clear instructions (e.g. starting each instruction with an imperative verb)
- Understand how to integrate images into a set of instructions
- Have an awareness of the importance of including safety information in a set of written instructions.

Choosing and creating a template

- You need to choose or create a template that best represents your instructions.
- If steps or numbers are important, you may need a template that best represents this need.
- If you are giving different examples of something, you steps may not be as important (ex: How to cite with MLA sample QRC in Canvas)



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<https://technicalandprofessionalcommunication.pressbooks.com/?p=75>

Writing Instructions: Overview

Most people have read instructions, but many have never written instructions for another audience. In many professional roles, you may have to write instructions. Instructions may be simple and brief, but other instructions may be complex and take more time to complete, so it is useful to know how to write useful instructions.

In a technical field, you will likely find yourself having to write instructions for others. Doing this type of writing may not be a formal assignment. Instead, someone may simply ask you to write, or even show him or her, how to do a specific task. Even if you are not formally writing a set of instructions, knowing how

to clearly communicate ways of following a process in a clear and logical fashion is incredibly important to your professional success, to the success of your company, and to keeping your workplace safe.

Writing useful instructions can be difficult people read and comprehend differently. Some people are visual learners, and so they may be more comfortable with following a more visual set of instructions. When writing instructions, you have to remember that readers have different educational backgrounds. Because of all these considerations, it is important to use a simple and logical style and format when writing instructions. Some of the key guidelines in writing instructions discussed in the headings below will help you to be successful in writing any set of instructions.

Conciseness and Clarity

If you look at a set of instructions, you may immediately notice that they are written in a way that is simple. Sentences are short. Each sentence contains a command, or action, with the action verb opening the sentence. The language overall is clear. Avoid using idioms, jargon, slang, nicknames, abbreviations, or other terminology that your general reader may find confusing.

Audience

One of the biggest steps in preparing to write a set of instructions is to know your audience. Consider what the audience already knows about the task your instructions will ask them to complete. What is the level of education of the audience? Think about what the audience might find confusing.

Note under what conditions they will use your instructions. All these considerations will help you to write your instructions toward the specific needs of your audience. For example, if you are writing instructions to software developers, you will not need to explain to them how to open a basic software application. If you were writing the same set of instructions to a group of senior citizens, it likely would be a good idea to explain the basics of opening a basic software application.

If an audience is likely to have a wide range of experience and knowledge that includes varying levels of familiarity and expertise, you can use various techniques to keep each set of instructions concise and focused on a single task, while still providing necessary information. For example, you can create separate instructions for prerequisite information and provide your audience with the means to quickly and easily access the separate instructions through a hyperlink or appendix.

When you consider your audience, you need to tailor your instructions to that specific audience. When you do this, there are a few considerations you may need to make.

- What background does your audience have and what prior knowledge might they possess?
- What will their needs/interests be?
- How will their demographics affect how you write? For example, if your audience is non-native speakers, you will have to be aware of language issues and make sure your visuals are clear.
- Will your audience consist of multiple variations? If your audience consists of people from varied backgrounds, your writing must be tailored to the majority of your audience, and you may consider adding additional information in an appendix or through links.

When you consider the prompts above, you may find yourself adding information through side notes or tips. Make sure to not add any unnecessary information. Make sure your instructions has a clear organization and add examples and graphics where needed.

Graphics

Including a visual for each step you have listed in your set of instructions helps your audience follow along with the task your instructions are guiding them through. You may consider that your audience may be more comfortable following a set of visual instructions over written instructions, so it is always wise to include graphics within your instructions. You can do this by giving an image or photograph for each step you are asking your audience to follow. You may also use graphics or other images to illustrate what specific tools look like, or to point out certain components of specific tools your audience will be using.

The best way to get graphics for any set of instructions you write is to complete the task yourself and take photos of each step within that task. When taking photos, make sure each photo is clear and does not include any glare that makes the photo difficult to interpret. Make sure to also designate dimensions for various objects within your graphics, as the objects do not always appear to scale.

One of the more important aspects to remember about including graphics within your set of instructions is to correlate an image with the text that best represents that image.

Formatting

Remember that readers will be performing the task set out in your instructions as they read through your instructions. You should not use small, solid blocks of texts as that is often difficult to read. Make sure to create a layout and design for your instructions that allows for easy readability. Use white space to separate text from graphics and to help visually separate steps. Keeping the page simple, but with a defined hierarchy, will help your audience in following the instructions.

When designing your page, a solid hierarchy is important as it

allows your audience to scan the instructions with relative ease. The use of bold headings, italics, and roman numerals will aid the reader in finding their place easily and helps with the overall visual appearance.

Order

You need to write out your instructions in a logical progression. Make sure to clearly outline the purpose of your instructions on the first page. Follow the statement of purpose with specific steps for accomplishing the task. Technical instructions must flow in a logical pattern. For example, when assembling a table it would not be good if you put the finishing touches on it before you had all the screws in place. As stated before, there should also be clear graphics where necessary to clarify the action. Remember that your audience may need clear visuals for each necessary step.

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Section 4.1 A Guide for Writing Your Instructions

Jessica Jorgenson Borchert

Writing Your Instructions

The sections below will walk you through how to write your instructions.

Introduction

What is included in your introduction will depend on who is using your instructions. Your introduction could state the purpose, share who the intended audience is, give an overview of the organization of the instructions, and share safety information.

Description of Equipment

If there is equipment that the audience needs to know about for completing the instructions, you will need to provide a description of that necessary equipment.

Materials/Equipment List

Provide a list of materials or tools needed for the reader of the instructions to complete the task. A list of supplies is always helpful to make sure the audience knows they have everything they will need.

Safety Information

All instructions need to include warnings, cautions, or information on hazardous or dangerous material that may be used when following the instructions. .

Procedure

The procedure will include the actual steps the audience needs to follow to complete the task. Make sure with each step you give the reader enough information to complete the task. It is advisable that you put steps into a numbered list so that it is clear to the reader what order the steps need to be performed in. Make sure to add white space (one line or space) between each step. Highlight any key words or terms to your reader. Clearly state to your audience what to do if they make a mistake in performing the instructions. Make sure to include visual aids (graphics, images, photographs) in your instructions to help make each step clear to your audience.

Troubleshooting

Include troubleshooting tips for your reader in case something goes wrong while following the instructions. Putting this information into a table format typically works best.

Writing Style Tips for Instructions

Generally, people try to avoid reading instructions. They try to figure out for themselves how to complete the task, build the machine, or put the table together. People often only read instructions after their own efforts fail. A simple design, plain wording, and clear structure will ensure your audience pays attention to your instructions and understand the instructions.

When writing technical documents and instructions, keep the following writing tips in mind:

- Use a lot of imperative, command or direct address, kinds of writing. It is OK to use “you” when writing instructions, because you are addressing the reader directly.
- Use active instead of passive voice.
- Do not leave out articles such as a, an, and the.
- Use action verbs.
- Ensure graphics match descriptive text to avoid confusion.
- Label graphics by the specific step that graphic is associated with.
- Keep text short but descriptive.
- Avoid complicated jargon. Instead use simple verbiage to ensure understanding by a broad spectrum of users.
- Use concise headings and subheadings to describe and highlight each section.
- Leave plenty of white space around headings.
- Highlight safety information and warnings.
- Keep illustrations as simple as possible.

[13]

Section 4.2 Usability Testing

Jessica Jorgenson Borchert

Usability Testing

Whenever you create a set of instructions, you will have to test your instructions for usability. Testing a draft of your written instructions can help you see where improvements need to be made. Usability testing is a technique used in user-centered interaction design to evaluate a product by testing it on users. This can be seen as an irreplaceable usability practice, since it gives direct input on how real users use the system. A usability test should be performed on multiple testers for each updated draft of your instructions. The steps listed below will walk you through how to conduct usability testing.

1. **Choose testers from a group that represents your audience:** Make sure that your testers have similar traits to your intended audience for the instructions. To find testers who will be similar, you may have to ask some preliminary questions to gauge their education and experience. For example, if writing instructions for a beginner audiences,

you would not want to test your instructions on an expert audience.

2. **Choose how you will evaluate the tester's performance:** In testing instructions, you can use a number of methods. One method would be to have testers follow the "think aloud" method of evaluation where the tester verbalizes everything that is going through their head as they complete the instructions while you take notes. Doing this can help you see if anything is unclear about your instructions.
3. **Get feedback:** Make sure to look through your notes and ask the tester for clarification and elaboration on the problems they encountered while following the instructions.
4. **Edit and revise your instructions:** Based on the results, take time to revise your instructions.
5. **Conduct another round of usability tests:** Once the instructions are revised, you will again want to complete another round of usability tests to ensure the success of your instructions.

[14]

Section 4.3 Questions for Reflection

Jessica Jorgenson Borchert

Questions for Reflection

1. Name three important rules to remember for writing instructions
2. In what ways are graphics or visuals helpful for instructions?
3. Explain to me why we do usability testing. What are some major steps?

[PART V]

CHAPTER 5: Proposals and Project Management

Learning Objectives

- Students will understand what proposals are and learn about different types of proposals
- Students will learn to write a problem statement and research background information related to a specific problem or situation
- Students will further their understanding of group dynamics

What are proposals?

Many types of proposals exist. You may have already written a proposal for a research project, conference presentation, or a paper you were asked to write for a class. The main purpose of a proposal is to make a recommendation or argue for a need and persuade the reader to accept it. You write a proposal for a need with the hopes of receiving those resources to meet that need. In exchange for the money or other resources you are asking the reader to give you to solve a problem or recognize an opportunity, you will give the reader something they want,

create something that will be helpful to them, or do something they wish to have done. Proposals also exist to protect as they function like a contract. If you write a proposal, and it's accepted, you are then contracted to do the work the proposal describes. When you write a proposal, you are representing yourself, your idea, and your company. You are asking your readers to invest something (time, money, other resources), because you cannot provide it yourself. The readers will review the proposal with caution because they may have limited supplies and if your idea does not seem well thought out or effective, they will not consider it. If your business proposal is competing against others, the readers will need to consider each one in order to pick the best.

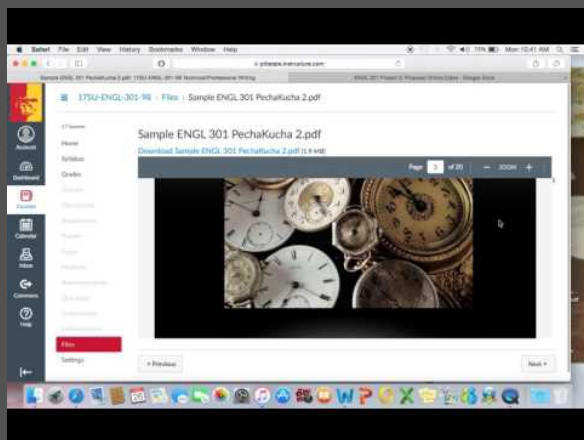
[15]

Section 5.1 Generic Structure of a Proposal

Jessica Jorgenson Borchert

Parts of a Proposal

All proposals need to have a framework. Typically, all proposal will include a introduction, problem, solution, and cost. I've further divided parts of a proposal in the sections below.



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Introduction

The introduction simply announces the focus of your proposal, or briefly shares what your proposal is about. Be careful not to give too much detail here. Think of this section as giving a reader a taste of what your proposal will uncover. Save all our details for the problem section of the proposal. Simply make sure this section states the purpose of your proposal clearly and gives the reader enough information for them to infer what the proposal will be about.

Problem Statement or Introduction of Problem

The problem section needs to introduce your readers to a problem, goal, or need that is relevant or important to them. Make sure to summarize the problem from your reader's point of view. (Note: Utilizing class discussion on creating themes from hot button issues will help you to do this.) Describing

the problem effectively will take some research. You may need to do some research to learn who your readers are, what is important to them, and why they may want this problem solved or a specific need met. You may also need to research the community where the problem is occurring. If working in a technical field, you likely will have to know as much as possible about the company or client you are working on the problem or need with. You will want to reach out to a potential reader to discuss the problem or need with first to gain some insight into the situation and to find out if writing the proposal is needed. This way you won't find yourself wasting time writing a proposal that is not needed or supported.

When writing your problem section, you will need to make sure to have a problem statement. A problem statement is simply a statement of the problem your proposal is working to address. For example, a problem statement may sound something like "homelessness is not only a personal matter for those who are homeless, but also a community concern since homelessness arises due to housing concerns, lack of proper mental health, and other problems that relate back to community." Following the problem statement, you should have a statement of need that illustrates what is needed to solve the problem, according to your proposal. Here you may state something like "We are asking for funding to help provide clothing, food, and temporary shelter to the homeless in our community." Later in the proposal you will share how this statement of need plays out in the solution you propose by giving further evidence with concrete details about how that amount of money or those resources will be helpful in solving the problem or realizing an opportunity.

Objectives

After the problem is articulated, make sure to state your goals or objectives for meeting the solution. These objectives help to connect the problem and the solution together. Objectives need to be brief and each objective needs to be part of a list. Objectives also need to be an action that helps to solve the problem or realize a solution to a present need.

Solution

How do you want to achieve the objectives that you listed? Answering this question should bring you to your solution. Here you must address each objective and persuade readers your solution is the best way to achieve the objectives you have outlined. You want to persuade readers that you have the best solution.

Make sure that in your solution you are not promising more than you can deliver. Proposals function like contracts, so proposing more than you can deliver will be similar to breaking a contract. The best way to ensure you are not promising more than you can deliver is to be specific about any limitations and clearly outline how each objective helps to support the solution.

Methods or Plan

After a solution is proposed, you need to share steps for achieving the solution. When you write this section, be sure to consider the following. Please note that not all the categories listed below may apply to your proposed method or plan:

- **Facilities**

- What facilities do you have that can help you to carry out this work? Consider if you will need to cover costs for any of these facilities, particularly if you end up needing to use the facilities of a client or partnering organization or business. You also need to consider how the facilities, if any, will help you to meet your objectives.

- **Equipment**

- If you need to purchase equipment, make sure to work this into your budget section. If you already have the equipment available, you will have to describe how it's useful to meeting the needs of your solution, who will use the equipment, and for how long.

- **Timeline or Schedule**

- All methods will require you to share a timeline, or

schedule, of all major steps that lead to your proposed solution. When setting up this timeline, it is best to share it visually as a Gantt chart, which is a bar chart that shares a project schedule. Make sure to include due dates or timeframes for drafts, research, and obtaining resources. Many good project managers will also advise you to plan for error in your schedule.

- **Qualifications**

- Qualifications are where you explain who is qualified to do the work you are proposing, and helps to show off how competent you are for completing the plan you are proposing. Qualifications also helps to show off the expertise and training of all your team members.

- **Management structure**

- Many proposals may require you to share the structure of your management team. You need to identify each person on your team, share their qualifications, and describe their role on the project. All successful projects require qualified people to do the work you are proposing to do, so sharing this information helps to persuade the readers of the potential success of your plan.

Costs, Resources, and Budget

Your readers will be investing time and money in your project, so it will help to share with them how much your project will cost. You will also need to be clear with them about what resources you already have that can be used for this project, along with sharing a budget of any costs that will be incurred during the life of the project. A budget statement is a good way for organizing and categorizing your expenses and resources. You will also need to think about compensating people on the project for the work they are planning to do, and these costs may need to be written into the budget.

Appendices and Supplementary Material

Occasionally you may have to include appendices or other supplementary material within your proposal. These could include things like maps that highlight areas that need to be addressed for community improvement or sharing CVs illustrating the expertise of everyone on the project. Never include supplementary material that was not asked for by the client or supplementary material that does not make sense to include.

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Section 5.2 Project Management and Team Dynamics

Jessica Jorgenson Borchert

Project Management

Project Management refers to the ways you, as a team, manage a project through delegating tasks and meeting deadlines. There are many ways to manage a project, but one of the key strategies for successfully managing a project is through building a foundation on teamwork and clearly communicating deadlines and tasks among all team members.

Occasionally, teams have leadership roles. Other times within a team environment everyone is given the same type of status, and assumes the responsibilities most consistent with their position or role in the life of the project.

Below I give a definition of what teamwork is, and also take time to discuss a couple different types of team dynamics that may play out during a project.

Teamwork

As you note from the discussion above, teamwork is an important part of completing a project outlined within a proposal. Before I describe some key team dynamics and roles, I need to outline what a team is. A team is defined as a group of people with shared goals or objectives. This means that everyone on your team needs to be committed to the project you are outlining in your proposal.

Team Dynamics

When one thinks of a team, it is typical to think of one person as a leader, however this doesn't have to be the case. Many companies are embracing a style of project management called agile project management. An agile style of project management does not designate one person as a leader. Instead communication between everyone on the team, and the client for whom the proposal is written to, is emphasized. This means everyone carries an equal role within the team environment for carrying out the tasks of the project. Agile project management also requires that all team members openly communicate with one another and the client, which often requires regular meetings, emails, and calls. A regular, open line of communication is needed for all team members and the client if agile project management is to be successful.

A more traditional view of team dynamics incorporates the roles of a leader, and some project management styles still use these traditional group dynamics. For simplicity's sake, I've listed four roles people can take on during a team project below. Please realize that you may take on a couple of these roles, or perhaps even all of these roles, as you work on a collaborative project.

1. **Leader:** A leader will work to define the project, if needed. A leader will also help delegate tasks, suggest deadlines, and take on other roles consistent with leadership. This person is typically seen as a project lead.
2. **Problemater:** The term problemater describes an individual who will take time to ask questions about the

project in order to overcome potential future problems, sometimes before the problems occur. They will often ask challenging questions that make team members think more deeply about a project. These types are also good at coming up with innovative strategies.

3. **Supporter:** A supporter will often step in when a team member may not have completed their assigned tasks, or if someone needs to step in to take on extra workload. A supporter is necessary to any project since they also work to improve team morale.
4. **Negotiator:** The negotiator will recognize conflict within a team structure and work to resolve that conflict.

As noted above, these roles may not be static or prescribed. You may also find yourself at times acting as a leader on one project, whereas you take on the role of a supporter in another project. Your role on the team may likely correspond with your tasks on the project. In other words, if you are an expert on a large aspect of the project, you may be identified as having more of a leadership role than a supporting role.

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Section 5.3: Questions for Reflection

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Questions for Reflection

1. What is the purpose of a proposal? What might be an example of a proposal you write in a business, professional, or education setting?
2. Briefly describe different parts, or sections, in a typical proposal.
3. Tell me why team dynamics are important in a large-scale project.

[PART VI]

CHAPTER 6: Writing for Global Audiences

Learning Objectives

- Students will be able to articulate the importance of knowing how to communicate across cultures
- Students will understand the difference between low-context culture and high-context cultures, and be able to apply that understanding to written environments

Introduction to Writing for Global Audiences

In Chapter 2 of this text, I introduced you to the term genre. Remember a genre is a specific kind of document that carries with it a specific set of characteristics. All genres are created according to the cultural values and systems of the society in

which they are produced. The reason that societies create genres, systems, and values according to their culture is in efforts to reduce uncertainty by providing and creating institutions, networks, and documents that all citizens can learn to understand and therefore reproduce themselves for various means of communication. With this discussion in mind, it is important to note that each culture will have different legal, economic, and social systems in place that may not reflect formal national boundaries. For example, debates still exist about who controls what shoreline.

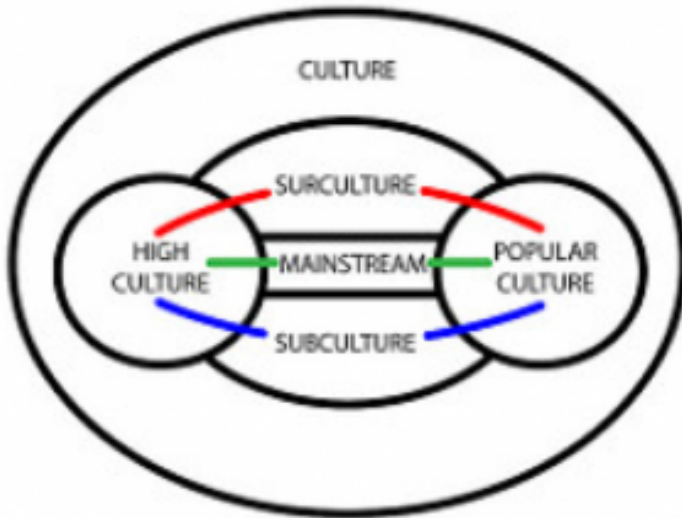
As you can imagine from the discussion above, such differences between cultures can make any kind of communication between different cultures and nations complex and even problematic. In order to help ease these concerns, and make communication between different cultures easier, it's helpful to know what culture is, and how to identify cultural differences. This chapter will help you to understand the role of culture in communication so that you can apply it to real-life situations you may have in the workplace.

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Section 6.1 The Importance of Culture

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Culture refers to the shared systems, beliefs, and values of a particular group of people. Often people who share the same culture have the same language, sense of ethics and morality, cuisine, and social habits. The figure shared below shares a visual representation of how culture operates. In this figure, culture is what embraces other, small facets of culture, such as subculture. In other words, culture is the influencer of subculture, countercultures, and the mainstream.



Visual Representation of Culture

Source: Cesar Harada, Subculture and Mainstream, Flickr, May 15, 2013, <https://www.flickr.com/photos/worldworldworld/8741011624>. September 6, 2018. 2.0 CC

When thinking of cultures, it is easiest for us to divide them into two types: high-context cultures and low-context cultures. However, no culture will come out and tell you if it is a high-context culture or a low-context culture. Instead you must learn about the norms of that culture in order to determine if they are a high-context culture or a low-context culture. In the sections that follow, I'll detail what each is and give some characteristics and examples.

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Section 6.2 High-Context Cultures

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High-Context Cultures

Japan functions as an example of a high-context culture because it is primarily a collectivist culture that places a high value on intrapersonal relationships. Because of the emphasis on collectivism and intrapersonal relationships, communication is often done through contextual elements, such as through nonverbal communication in the form of body language. Other contextual elements that help communication form in this environment is a person's status, or tone of voice. In this manner, high-context cultures do not necessarily need written rules or language to communicate. Instead their communication can take the form of nonverbal cues or traditional social behaviors.

High-context cultures carry with them a particular set of values, which are often in contrast to low-context cultures that will be discussed in the next section. The values of high-context cultures are the following:

- Group harmony

- Collectiveness
- Belonging
- Age/seniority
- Group consciousness
- Cooperation
- Quality
- Patience
- Indirectness
- Go-between

When communicating with high-context cultures, it is important you remember these values, as knowing the values listed above will aid you in communication with clients, customers, and employees who may be from a high-context culture.

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Section 6.3 Low-Context Cultures

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Low-Context Cultures

The United States is an example of what can be considered a low-context culture. In a low-context culture, context is of less importance. Instead these cultures emphasize ideals of individualism, and communication is often performed as written or verbal communication. In fact, in low-context cultures, business agreements often require a contract, whereas in high-context cultures a handshake can be a sign of an unspoken agreement.

Low-context cultures carry with them a particular set of values, which are often in contrast to high-context cultures. The values of low-context cultures are the following:

- Freedom
- Independence
- Self-reliance
- Equality

- Individualism
- Competition
- Openness
- Efficiency
- Time
- Directness

When communicating with low-context cultures, it is important you remember these values, as knowing the values listed above will aid you in communication with clients, customers, and employees who may be from a low-context culture.

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Section 6.4 Global Graphics

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Global Graphics

We often think of communication as primarily written, but as our global marketplace continues to grow, and companies use social media, we find ourselves communicating more through graphics or other visuals. Realize that even when communicating with global audiences, visuals and graphics still matter. Sometimes using visuals matter more, especially considering language barriers, but visuals are an excellent way to communicate relevant information. For example, as drivers we see visual communication with stop lights and roadside signage.

When you communicate globally, remember that everything depends on context. Symbols, images, and even colors are not free from cultural context. For example, in a Muslim country the symbol of the red cross may represent Christianity, whereas in the United States we see the red cross to symbolize the nonprofit organization, the American Red Cross.

The goal in communicating with visuals and other graphics

in global settings is to keep the image or symbol simple and avoid any kind of cultural connotations. The International Organization for Standardization (ISO) has created a number of symbols that have been approved for global use. These graphics are often used in manuals, public signs, guidebooks, and instructions created for global audiences. The handbook of acceptable global graphics can be found here. You are free to use these graphics when creating documents that may need them for global users.

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Section 6.5 Questions for Reflection

Jessica Jorgenson Borchert

Questions for Reflection

1. The United States is an example of a low-context culture. Explain.
2. Japan is an example of a high-context culture. Explain.
3. What are global graphics? How are these graphics helpful for communicating with global audiences?

Appendix: Works Cited

Jessica Jorgenson Borchert

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