Introduction to Professional Communications

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Contents

Adaptation statement

Introduction to Professional Communications was adapted and remixed by Melissa Ashman from several open textbooks as indicated at the end of each chapter. Unless otherwise noted, *Introduction to Professional Communications* is (c) 2018 by Melissa Ashman and is licensed under a Creative Commons-Attribution-NonCommercial-ShareAlike 4.0 International license. In 2019, the textbook was updated. In 2020, minor updates were done to chapter 5.2 The adaptation statement below and all chapter attribution statements have been updated accordingly.

In *Introduction to Professional Communications*, examples have been changed to Canadian references, and information throughout the book, as applicable, has been revised to reflect Canadian content and language. Gender neutral language (they/their) has been used intentionally. In addition, while general ideas and content may remain unchanged from the sources from which this adapted version is based, word choice, phrasing, and organization of content within each chapter may have changed to reflect this author's stylistic preferences.

The following additions or changes have been made to these chapters:

Chapter 1.1

- Added concept of learning to write being messy

Chapter 1.2

- Added questions for reflection (based on content from adapted sources)

Chapter 1.3

- Added questions for reflection
- Added information on fake news

Chapter 2.1

- Added Canadian examples
- Revised examples of regular and research questions to make them relevant for a business workplace

Chapter 2.2

- Added social media posts and interviews with people with expertise or experience as source examples
- Revised/modified some of the examples for fact vs opinion vs objective vs subjective
- Used Canadian examples of popular sources
- Used Canadian examples of professional sources

Chapter 2.3

- Added questions for reflection
- Added .ca to list of domains

Chapter 2.4

- Expanded questions for reflection section

Chapter 2.5

- Added including recommendations after the conclusions of an argument

Chapter 3.1

- Changed definition of effective writing to focus on needs of audience

Chapter 3.2

- Added alternate names of some communication models
- Added new examples of job interview experiences
- Added questions for reflection
- Added statement about need to consider/discuss communication models

Chapter 3.4

- Created a Canadian example

Chapter 3.7

- Added statistics and a discussion of consumption of social media by different age groups

Chapter 4.1

- Expanded discussion of the need for clear, plain writing

Chapter 4.2

- Added an analogy of using a 25 cent word in place of a $100 one
- Added statements for reflection

Chapter 4.4

- Added questions for reflection

Chapter 5.1

- Added a new example of a sample memo
- Expanded the discussion on memo format
- Added information on subject lines

Chapter 5.2

- Revised the table describing the components of a letter
- Added a new sample letter and a new explanation of the parts of that letter

Chapter 5.3

- Added discussion on keeping public persona on social channels professional

Chapter 5.4

- Generalized from sales proposals to business proposals more broadly

Chapter 5.5

- Expanded report formatting

Chapter 5.6

- Expanded on discussion of logical, emotional, and ethical/credible fallacies
- Added links to examples of logical, emotional, and ethical/credible fallacies

Chapter 5.7

- Generalized the chapter from sales messages specifically to persuasive messages more broadly
- Expanded on format for persuasive messages

Chapter 5.8

- Added a section on how to “know the job”

Chapter 5.9

- Significantly edited sections on contact information, work experience, and education
- Added a section on “other relevant qualifications”

Chapter 5.11

- Expanded on the direct and indirect approaches to bad news delivery
- Added direct and indirect approach examples
- Expanded on the discussion of the parts/structure of bad news messages

Chapter 6.5

- Modified punctuation rules for lists
- Added a new example for use of colon in list lead-ins

Chapter 6.6

- Added a new example of text with heavy emphasis applied
- Changed phrasing from “highlighting” to “emphasis”

Chapter 7.1

- Added definitions of proofreading and editing
- Added a list of strategies for proofreading and editing

Chapter 7.2

- Generalized to business messages from academic papers/assignments

Chapter 8.3

- Added additional interpretations of lack of eye contact to account for cultural differences and other reasons
- Added information about acknowledging emotion or feelings of speakers directly (through words) or indirectly (through paralinguistic cues)

Chapter 8.4

- Expanded discussion of how to provide feedback by commenting on what works well and what should be avoided

Chapter 8.6

- Expanded discussion of benefits of recording yourself while presenting
- Added discussion of common presenting challenges and strategies to overcome these issues
- Added questions for reflection
- Added information about using a microphone when presenting
- Added in hard surfaces in a room to the list of reasons for adjusting voice projection
- Revised section on pronunciation to reflect enunciation (the articulation of words)
- Added a discussion of storytelling as a presentation technique

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PART 1: COMMUNICATION FOUNDATIONS

1.1 Learning to write

You may think that some people are simply born as better writers than others, but in fact writing is a reflection of experience and effort. If you think about your successes as a writer, you may come up with a couple of favourite books, authors, or teachers that inspired you to express yourself. You may also recall a sense of frustration with your earlier writing experiences. It is normal and natural to experience a sense of frustration at the *perceived* inability to express oneself. The emphasis here is on your perception of yourself as a writer as one aspect of how you communicate.

Looking back

Before you can learn to write in a new context, it's helpful to explore how you got to this point. Every one of us arrives in the workplace (and the classroom) with our own beliefs and assumptions about communication. Sometimes, these beliefs are helpful. Sometimes, however, our beliefs can hold us back. So, before we dive in, let's take a moment to reflect.

Read the following questions and think them over. It may be helpful for you to write some notes in a journal.

Questions for reflection

1. How did you learn to read and write? Who influenced you?
2. What do people in your culture and/or your family believe about reading, writing, and telling stories?
3. What are some of your most positive reading and writing memories?
4. Describe some moments when you struggled with reading or writing. How did you react?
5. Have you ever changed a belief around reading and writing?
6. Do you believe that you are a good writer? Why or why not?
7. What is the most frustrating part of reading or writing for you?

Now, reflect on your answers. Do you notice any patterns? Can you identify any beliefs that might hold you back? Let's take a look at how other students answered.

Simran's story

Simran's earliest memories of reading involve being snuggled up with her grandma, siblings and cousins. She loved being read to. Before she was old enough to go to school, she often sat with her older siblings as they did their homework and pretended to write. Unfortunately, when Simran was in Grade 4, she had a teacher who criticized her writing. She began to believe that she was a bad writer. By the time she reached Grade 12, English was Simran's worst subject.

Today, Simran likes to read for fun, but hates to read for school. When she gets a writing assignment, she often starts and stops and procrastinates. She writes a sentence then gets caught up in grammar details, deletes it, starts over, then checks social media. In the end, she pulls an all-nighter and hands in her assignment with just minutes to spare. Simran likes to write fan fiction based on her favourite T.V. show, and she doesn't understand why the words come so easily when she's writing for fun, but so painfully when she's writing for school. She isn't looking forward to taking a business communication course because she thinks completing the assignments will be stressful.

Jian Yi's story

Jian Yi began his education in China. He was an excellent student and enjoyed writing. His teachers often praised his beautiful cursive. When Jian Yi was 12, his family moved to Canada. He was placed for a short time in an EAL class, but quickly was integrated into a Grade 7 classroom. He understood very little and felt embarrassed whenever he was asked to speak in class. Though Jian Yi's English skills improved dramatically, he never again enjoyed school.

Jian Yi doesn't enjoy reading or writing. He majored in Accounting because he believed there wouldn't be much reading and writing, and he's disappointed that he has to take a communications class. He is taking a full course load and he wants to get through this course as quickly as possible.

Both Simran and Jian Yi are good writers; Simran can write short stories and Jian Yi can write in multiple languages. Neither, however, expects to do well in this course. That's the power of unhelpful beliefs. They can set us up for failure before we've even started. By talking about our reading and writing beliefs and figuring our where they came from, we can challenge unhelpful beliefs and be more successful.

Thinking about our reading and writing beliefs is also a great way to celebrate the communication strengths you already have. For example, if you've learned Traditional Stories from elders in your community, you already know a story can be used as a powerful teaching tool when tailored to the right audience at the right time. Your ability to play music or sing will help you write sentences that people will enjoy reading. If you can shift between multiple languages or dialects, you can adapt to a new workplace environment. Our goal is not to erase what's unique about your writing voice to make it "appropriate" for the workplace, but to build on your existing skills so that you can be successful in whatever workplace you enter.

What do experts say about reading and writing beliefs?

The question of how to become a better writer has been studied extensively for decades. We actually know a lot about how people learn to read and write, and how to help students improve. Here are just a few writing beliefs that researchers, writing teachers and scholars believe to be true (Fink, 2015). How many of these points do you agree with?

1. Everyone can become a better writer.
2. People learn to write by writing.
3. Writing is a process.
4. Writing helps us think and figure out what we have to say.
5. There is no one way to write well. Different writers have different processes and may even change their process depending on what type of writing they're doing.
6. Editing, revising and rethinking are important to help writers reach their potential.
7. Writing and reading are related. Reading will improve your writing. It doesn't even matter what genre you read. Read what you enjoy.
8. Talking about your writing with your peers and your teacher can make you a better writer.

In short, you can become a better writer. In fact, some studies have found that students who believe that they can become good writers improve faster than those who don't (Baaijen, Galbraith, and de Glopper, 2014).

I believe that you are a good writer. I believe that you can become a better writer. I believe that you use your writing skills every day. It's hard to change a belief overnight, so perhaps you don't yet agree with me. That's okay. Over the course of the semester, we'll build on what you already know and apply it to the workplace. We'll figure out a writing process that works for you. And hopefully, by the end of the semester, you'll have created writing that you're proud of.

Looking forward

You are your own best ally when it comes to your writing. Keeping a positive frame of mind about your journey as a writer is not a cliché or simple, hollow advice. Your attitude toward writing can and does influence your written products.

Reading is one step many writers point to as an integral step in learning to write effectively. You may like Harry Potter books or be a Twilight fan, but if you want to write effectively in business, you need to read business-related documents. These can include letters, reports, business proposals, and business plans. You may find these where you work or in your school's writing centre, business department, or library; there are also many websites that provide sample business documents of all kinds. Your reading should also include publications in the industry where you work or plan to work. You can also gain an advantage by reading publications in fields other than your chosen one; often reading outside your niche can enhance your versatility and help you learn how other people express similar concepts. Finally, don't neglect popular or general media like newspapers and magazines. Reading is one of the most useful lifelong habits you can practice to boost your business communication skills.

In the "real world" when you are under a deadline and production is paramount, you'll be rushed and may lack the time to do adequate background reading for a particular assignment. For now, take advantage of your business communications course by exploring common business documents you may be called on to write, contribute to, or play a role in drafting in your future career. Some documents have a degree of formula to them, and your familiarity with them will reduce your preparation and production time while increasing your effectiveness.

When given a writing assignment, it is important to make sure you understand what you are being asked to do. You may read the directions and try to put them in your own words to make sense of the assignment. Be careful, however, to differentiate between what the directions say and what you *think* they say. Just as an audience's expectations should be part of your consideration of how, what, and why to write, the instructions given by your instructor, or in a work situation by your supervisor, establish expectations. Just as you might ask a mentor more about a business writing assignment at work, you need to use the resources available to you to maximize your learning opportunity. Ask the professor to clarify any points you find confusing, or perceive more than one way to interpret, in order to better meet the expectations.

Learning to write effectively involves reading, writing, critical thinking, and self-reflection. At times, it may seem like it's an incredibly messy process. Other times, it may feel tedious. Ultimately, writing is a process that takes time, effort, and practice. In the long-term, your skillful ability to craft messages will make a significant difference in your career.

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Baaijen, V., Galbraith, D., and de Glopper, K. (2014). *Effects of writing beliefs and planning on writing performance*. Retrieved from https://www.semanticscholar.org/paper/Effects-of-writing-beliefs-and-planning-on-writing-Baaijen-Galbraith/03701e3c57c3bca04881b7f7716f111250d6ce39.

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Attributions

1.2 Elements in communication

Communication can mean different things to different people. It is affected by and influenced by our experiences, perceptions, culture, and more. To start, let's reflect on our beliefs about communication.

Questions for reflection

- Think about communication in your daily life. When you make a phone call, send a text message, or like a post on Facebook, what is the purpose of that activity?
- Have you ever felt confused by what someone is telling you or argued over a misunderstood email?
- What does "communication" mean to you?
- What does "successful" communication look like to you?
- What are some barriers you've experienced when communicating with others in-person, online, or through writing?

There are many current models and theories that explain, plan, and predict communication processes and their successes or failures. In the workplace, we might be more concerned about practical knowledge and skills than theory. However, good practice is built on a solid foundation of understanding and skill.

Defining communication

The word communication is derived from a Latin word meaning "to share." Communication can be defined as "purposefully and actively exchanging information between two or more people to convey or receive the intended meanings through a shared system of signs and (symbols)" ("Communication," 2015, para. 1).

Let us break this definition down by way of example. Imagine you are in a coffee shop with a friend, and they are telling you a story about the first goal they scored in hockey as a child. What images come to mind as you hear their story? Is your friend using words you understand to describe the situation? Are they speaking in long, complicated sentences or short, descriptive sentences? Are they leaning back in their chair and speaking calmly, or can you tell they are excited? Are they using words to describe the events leading up to their big goal, or did they draw a diagram of the rink and positions of the players on a napkin? Did your friend pause and wait for you to to comment throughout their story or just blast right through? Did you have trouble hearing your friend at any point in the story because other people were talking or because the milk steamer in the coffee shop was whistling?

All of these questions directly relate to the considerations for communication in this course, including analyzing the audience, choosing a communications channel, using plain language, and using visual aids.

Before we examine each of these considerations in more detail, we should consider the elements of the communication process.

The Communication Process

The communication process includes the steps we take in order to ensure we have succeeded in communicating. The communication process comprises essential and interconnected elements detailed in Fig. 1.2.1. We will continue to reflect on the story of your friend in the coffee shop to explore each element in detail.

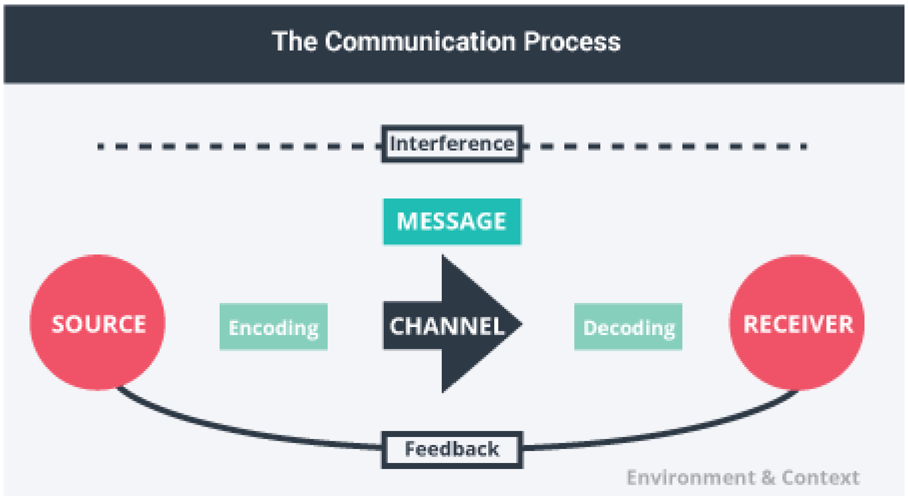

Fig. 1.2.1 The communication process by Laura Underwood

Source: The source comes up with an idea and sends a message in order to share information with others. The source could be one other person or a group of people. In our example above, your friend is trying to share the events leading up to their first hockey goal and, likely, the feelings they had at the time as well.

Message: The message is the information or subject matter the source is intending to share. The information may be an opinion, feelings, instructions, requests, or suggestions. In our example above, your friend identified information worth sharing, maybe the size of one of the defence players on the other team, in order to help you visualize the situation.

Channels: The source may encode information in the form of words, images, sounds, body language, and more. There are many definitions and categories of communication channels to describe their role in the communication process, including verbal, non-verbal, written, and digital. In our example above, your friends might make sounds or use body language in addition to their words to emphasize specific bits of information. For example, when describing a large defense player on the other team, they may extend their arms to explain the height of the other team's defense player.

Receiver: The receiver is the person for whom the message is intended. This person is charged with decoding the message in an attempt to understand the intentions of the source. In our example above, you as the receiver may understand the overall concept of your friend scoring a goal in hockey and can envision the techniques your friend used. However, there may also be some information you do not understand—such as a certain term—or perhaps your friend describes some events in a confusing order. One thing the receiver might try is to provide some kind of feedback to communicate back to the source that the communication did not achieve full understanding and that the source should try again.

Environment: The environment is the physical and psychological space in which the communication is happening (Mclean, 2005). It might also describe if the space is formal or informal. In our example above, it is the coffee shop you and your friend are visiting in.

Context: The context is the setting, scene, and psychological and psychosocial expectations of the source and the receiver(s) (McLean, 2005). This is strongly linked to expectations of those who are sending the message and those who are receiving the message. In our example above, you might expect natural pauses in your friend's storytelling that will allow you to confirm your understanding or ask a question.

Interference: There are many kinds of interference (also called "noise") that inhibit effective communication. Interference may include poor audio quality or too much sound, poor image quality, too much or too little light, attention, etc. In our working example, the coffee shop might be quite busy and thus very loud. You would have trouble hearing your friend clearly, which in turn might cause you to miss a critical word or phrase important to the story.

Those involved in the communication process move fluidly between each of these eight elements until the process ends.

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Attribution

1.3 Critical thinking

Although understanding is the foundation of all reading experiences, it is not the goal of most post-secondary reading assignments. Your professors (and future employers) want you to read critically, which means moving beyond what the text says to asking questions about the how and why of the text's meaning. In an era of proliferating "fake news" stories and campaigns to improve information literacy, being cautious in consuming information and media is paramount.

Let's reflect on what it means to think and read critically.

Questions for reflection

- What do you think "fake news" is and isn't?
- Do you feel comfortable identifying sources of information or news stories as biased or inaccurate?
- Can you think of an example of a "fake news" story? What makes it biased or inaccurate?
- What are the potential dangers of making decisions or acting upon biased or inaccurate information?
- What does it mean to think critically? How do you do it?
- What does it mean to read critically? How do you do it?

Reading critically

Reading critically means reading skeptically, not accepting everything a text says at face value, and wondering why a particular author made a particular argument in a particular way.

When you read critically, you read not only to understand the meaning of the text, but also to question and analyze the text. You want to know not just what the text says, but also how and why it says what it says. Asking questions is one key strategy to help you read more critically. As you read a text critically, you are also reading skeptically.

A critical reader aims to answer two basic questions:

1. What is the author doing?
2. How well is the author doing it?

What is the author doing?

To answer "what is the author doing?" begin by carefully examining the following:

- What are the author's claims (a claim is what the author says is true)?
- What is the evidence (evidence is what the author offers to support what they say is true)?
- What are the assumptions (assumptions are what the author says is true or will happen without giving any support)?

It may be helpful to try to see the argument from different angles:

- How else could the author have written this piece?
- What other kinds of evidence could have been used?
- What difference would that other evidence make?
- How has the author constructed his or her argument?

How well is the author doing it?

To answer "how well is the author doing it?" consider the following questions:

- How effective is the introduction? Why might the author have started the piece with this paragraph?
- Are the main ideas supported by solid evidence?
- What evidence does the author use? Is it effective? Useful? Can you think of other evidence?
- Is the author biased or neutral? How do you know?
- Does the conclusion effectively tie the argument together? Could you draw a different conclusion from this evidence?
- What kind of language is used? How would you describe the author's style?
- How is the piece organized?

Asking questions

Asking questions of a text helps readers:

- Predict what a text will be about
- Identify confusing parts of the reading
- Clarify what confused them
- Develop a response to the text
- Understand the author's purpose for writing a text

The easiest way to develop questions about a text is to be aware of your thinking process before, during, and after reading.

- What did you wonder about before you started reading?
- What did you think the text might be about?
- What questions did the text raise in your mind as you read?
- What seemed important or surprising?
- What were you wondering when you finished reading?
- What did the author hope to accomplish in writing this text?
- Did the author achieve that purpose?
- What remains unresolved in your mind?

Thinking critically

As you approach your writing, it is important to practice the habit of thinking critically. Critical thinking can be defined as “self-directed, self-disciplined, self-monitored, and self-corrective thinking” (Paul & Elder, 2007). It is the difference between watching television in a daze versus analyzing a movie with attention to its use of lighting, camera angles, and music to influence the audience. One activity requires very little mental effort, while the other requires attention to detail, the ability to compare and contrast, and sharp senses to receive all the stimuli.

As a habit of mind, critical thinking requires established standards and attention to their use, effective communication, problem solving, and a willingness to acknowledge and address our own tendency for confirmation bias. We’ll use the phrase “habit of mind” because clear, critical thinking is a habit that requires effort and persistence. People do not start an exercise program, a food and nutrition program, or a stop-smoking program with 100 percent success the first time. In the same way, it is easy to fall back into lazy mental short cuts, such as “If it costs a lot, it must be good,” when in fact the statement may very well be false. You won’t know until you gather information that supports (or contradicts) the assertion.

As we discuss getting into the right frame of mind for writing, keep in mind that the same recommendations apply to reading and research. If you only pay attention to information that reinforces your existing beliefs and ignore or discredit information that contradicts your beliefs, you are guilty of confirmation bias (Gilovich, 1993). As you read, research, and prepare for writing, make an effort to gather information from a range of reliable sources, whether or not this information leads to conclusions you didn’t expect. Remember that those who read your writing will be aware of, or have access to, this universe of data as well and will have their own confirmation bias. Reading and writing from an audience-centered view means acknowledging your confirmation bias and moving beyond it to consider multiple frames of references, points of view, and perspectives as you read, research, and write. False thinking strategies can lead to poor conclusions, so be sure to watch out for your tendency to read, write, and believe that which reflects only what you think you know without solid research and clear, critical thinking.

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Attributions

PART 2: THE RESEARCH PROCESS

2.1 Research questions

Questions for reflection

- Think about the last time that you did research. What kind of research did you do? Were you able to find all the sources you needed? If not, what kind of sources did you struggle to find?
- How do you use the internet when you research? What kind of sites do you visit? Why?
- What does academic integrity mean to you?
- How do you determine what sources to trust online?
- If you've also attended school in a different country, how does that school system teach source use?

Both professional researchers and successful student researchers develop research questions. That's because research questions are more than handy tools; they are essential to the research process.

By defining exactly what the researcher is trying to find out, these questions influence most of the rest of the steps taken to conduct the research. That's true even if the research is not for academic purposes but for other areas of our lives.

For instance, if you're seeking information about a health problem in order to learn whether you have anything to worry about, research questions will make it possible for you to more effectively decide whether to seek medical help–and how quickly.

Or, if you're researching a potential employer, having developed and used research questions will mean you're able to more confidently decide whether to apply for an internship or job there.

The confidence you'll have when making such decisions will come from knowing that the information they're based on was gathered by conscious thought rather than serendipity and whim.

Narrowing a topic

For many students, having to start with a research question is the biggest difference between how they did research in high school and how they are required to carry out their university research projects. It's a process of working from the outside in: you start with the world of all possible topics (or your assigned topic) and narrow down until you've focused your interest enough to be able to tell precisely what you want to find out, instead of only what you want to "write about."

Process of narrowing a topic

Visualize narrowing a topic as starting with all possible topics and choosing narrower and narrower subsets until you have a specific enough topic to form a research question.

All possible topics – You'll need to narrow your topic in order to do research effectively. Without specific areas of focus, it will be hard to even know where to begin.

Assigned topics – Ideas about a narrower topic can come from anywhere. Often, a narrower topic boils down to deciding what's interesting to you. One way to get ideas is to read background information in a source like Wikipedia.

Topic narrowed by initial exploration – It's wise to do some more reading about that narrower topic to a) learn more about it and b) learn specialized terms used by professionals and scholars who study it.

Topic narrowed to research question(s) – A research question defines exactly what you are trying to find out. It will influence most of the steps you take to conduct the research.

Background reading

It's wise to do some more reading about that narrower topic once you have it. For one reason, you probably don't know much about it yet. For another, such reading will help you learn the terms used by professionals and scholars who have studied your narrower topic. Those terms are certain to be helpful when you're looking for sources later, so jot them down or otherwise remember them.

For instance, if you were going to do research about the treatment for humans with bird flu, this background reading would teach you that professionals and scholars usually use the term avian influenza instead of bird flu when they write about it. (Often, they also use H1N1 or H1N9 to identify the strain.) If you didn't learn that, you would miss the kinds of sources you'll eventually need for your assignment.

Most sources other than journal articles are good sources for this initial reading, including the Globe and Mail or other mainline Canadian news outlets, Wikipedia, encyclopedias for the discipline your topic is in, dictionaries for the discipline, and manuals, handbooks, blogs, and web pages that could be relevant.

This initial reading could cause you to narrow your topic further, which is fine because narrower topics lead to greater specificity for what you have to find out. After this upfront work, you're ready to start developing the research question(s) you will try to answer for your assignment.

Developing your research question

Because of all their influence, you might worry that research questions are very difficult to develop. Sometimes it can seem that way. But we'll help you get the hang of it and, luckily, none of us has to come up with perfect ones right off. It's more like doing a rough draft and then improving it. That's why we talk about developing research questions instead of just writing them.

Steps for developing a research question

The steps for developing a research question, listed below, can help you organize your thoughts.

Step 1: Pick a topic (or consider the one assigned to you).

Step 2: Write a narrower/smaller topic that is related to the first.

Step 3: List some potential questions that could logically be asked in relation to the narrow topic.
Step 4: Pick the question that you are most interested in.
Step 5: Revise question you're interested in so that it is more focused and less vague.
After you think of each research question, evaluate it by asking whether it is:

- Logically related to the topic
- In question form
- Not answerable with a quick Google search
- Specific, not vague

Sometimes the first draft of a research question is still too broad, which can make your search for sources more challenging. Refining your question to remove vagueness or to target a specific aspect of the topic can help.

Most of us look for information to answer questions every day, but research questions are different from what we might call "regular questions."

Regular question	**Research question**
What time does the movie start?	How can movie theatres use attendance and sales data to inform scheduling of upcoming films?
Who invented the first computer?	Why is the lifespan of new technologies decreasing?
What is social media?	Why is social media an important tool to use in post-secondary classrooms?
Which store in my neighbourhood has the lowest priced produce?	How does the location of a store affect the types and prices of produce offered for sale?

Attributions

This chapter contains information taken from multiple sources:

- The Purpose of Research Questions, Narrowing a Topic, Background Reading, Developing your Research Question, and Regular vs Research Questions in Choosing & Using Sources: A Guide to Academic Research, which is used under a CC-BY 4.0 International license
- The Research Process in Business Writing for Everyone, which is used under a CC-BY-NC 4.0 International license.

2.2 Categorizing sources

Once you have your research question, you'll need information sources to answer it and meet the other information needs of your research project.

This section about categorizing sources will increase your sophistication about them and save you time in the long run because you'll understand the "big picture". That big picture will be useful as you plan your own sources for a specific research project.

You'll usually have a lot of sources available to meet the information needs of your projects. In today's complex information landscape, just about anything that contains information can be considered a potential source.

Here are a few examples:

- Books and encyclopedias
- Websites, web pages, and blogs
- Magazine, journal, and newspaper articles
- Research reports and conference papers
- Field notes and diaries
- Social media posts
- Photographs, paintings, cartoons, and other art works
- TV and radio programs, podcasts, movies, and videos
- Illuminated manuscripts and artifacts
- Bones, minerals, and fossils
- Preserved tissues and organs
- Architectural plans and maps
- Pamphlets and government documents
- Music scores and recorded performances
- Dance notation and theater set models
- People with expertise or experience on a particular topic

With so many sources available, the question usually is not whether sources exist for your project but which ones will best meet your information needs.

Being able to categorize a source helps you understand the kind of information it contains, which is a big clue to (1) whether might meet one or more of your information needs and (2) where to look for it and similar sources.

A source can be categorized by:

- Whether it contains quantitative or qualitative information or both
- Whether the source is objective (factual) or persuasive (opinion) and may be biased
- Whether the source is a scholarly, professional or popular publication
- Whether the material is a primary, secondary or tertiary source
- What format the source is in

As you may already be able to tell, sources can be in more than one category at the same time because the categories are not mutually exclusive.

Quantitative or qualitative

One of the most obvious ways to categorize information is by whether it is quantitative or qualitative. Some sources contain either quantitative information or qualitative information, but sources often contain both.

Many people first think of information as something like what's in a table or spreadsheet of numbers and words. But information can be conveyed in more ways than textually or numerically.

Quantitative information – Involves a measurable quantity—numbers are used. Some examples are length, mass, temperature, and time. Quantitative information is often called data, but can also be things other than numbers.

Qualitative information – Involves a descriptive judgment using concept words instead of numbers. Gender, country name, animal species, and emotional state are examples of qualitative information.

Fact or opinion

Thinking about the reason an author produced a source can be helpful to you because that reason was what dictated the kind of information they chose to include. Depending on that purpose, the author may have chosen to include factual, analytical, and objective information. Or, instead, it may have suited their purpose to include information that was subjective and therefore less factual and analytical. The author's reason for producing the source also determined whether they included more than one perspective or just their own.

Authors typically want to do at least one of the following:

- Inform and educate
- Persuade
- Sell services or products or
- Entertain
- Combined purposes

Sometimes authors have a combination of purposes, as when a marketer decides he can sell more smart phones with an informative sales video that also entertains us. The same is true when a singer writes and performs a song that entertains us but that she intends to make available for sale. Other examples of authors having multiple purposes occur in most scholarly writing.

In those cases, authors certainly want to inform and educate their audiences. But they also want to persuade their audiences that what they are reporting and/or postulating is a true description of a situation, event, or phenomenon or a valid argument that their audience must take a particular action. In this blend of scholarly author's purposes, the intent to educate and inform is considered to trump the intent to persuade.

Why intent matters

Authors' intent usually matters in how useful their information can be to your research project, depending on which information need you are trying to meet. For instance, when you're looking for sources that will help you actually decide your answer to your research question or evidence for your answer that you will share with your audience, you will want the author's main purpose to have been to inform or educate their audience. That's because, with that intent, they are likely to have used:

- Facts where possible.

- Multiple perspectives instead of just their own.
- Little subjective information.
- Seemingly unbiased, objective language that cites where they got the information.

The reason you want that kind of resource when trying to answer your research question or explaining that answer is that all of those characteristics will lend credibility to the argument you are making with your project. Both you and your audience will simply find it easier to believe—will have more confidence in the argument being made—when you include those types of sources.

Sources whose authors intend only to persuade others won't meet your information need for an answer to your research question or evidence with which to convince your audience. That's because they don't always confine themselves to facts. Instead, they tell us their opinions without backing them up with evidence. If you used those sources, your readers will notice and not believe your argument.

Fact vs. opinion vs. objective vs. subjective

Need to brush up on the differences between fact, objective information, subjective information, and opinion?

Fact – Facts are useful to inform or make an argument.

Examples:

- The sky is blue.
- Some countries follow Generally Accepted Accounting Principles (GAAP) and others follow International Financial Reporting Standards (IFRS).
- Beethoven had a reputation as a virtuoso pianist.

Opinion – Opinions are useful to persuade, but careful readers and listeners will notice and demand evidence to back them up.

Examples:

- That was a good movie.
- Strawberries taste better blueberries.
- Generally Accepted Accounting Principles (GAAP) are better than International Financial Reporting Standards (IFRS).
- Placing one space after a period is the most professional way to type messages.
- Beethoven's reputation as a virtuoso pianist is overrated.

Objective – Objective information reflects a research finding or multiple perspectives that are not biased.

Examples:

- "Several studies show that some font types are more easily read by people with vision impairment than others."
- "A 2017 study from Kwantlen Polytechnic University showed that adults have the same ability as toddlers in taking the perspective of another person."

Subjective – Subjective information presents one person or organization's perspective or interpretation. Subjective information can be meant to distort, or it can reflect educated and informed thinking. All opinions are subjective, but some are backed up with facts more than others.

Examples:

- “The simple truth is this: You should never use the Comic Sans font to write a business message.”
- “Resumes for graduating students should be as short as possible—ideally one to two pages.”

Primary, secondary & tertiary sources

Another information category is called publication mode and has to do with whether the information is:

- First-hand information (information in its original form, not translated or published in another form).
- Second-hand information (a restatement, analysis, or interpretation of original information).
- Third-hand information (a summary or repackaging of original information, often based on secondary information that has been published).

When you make distinctions between primary, secondary, and tertiary sources, you are relating the information itself to the context in which it was created. Understanding that relationship is an important skill that you’ll need in university, as well as in the workplace. Noting the relationship between creation and context helps us understand the “big picture” in which information operates and helps us figure out which information we can depend on.

Primary sources – Because it is in its original form, the information in primary sources has reached us from its creators without going through any filter. We get it first-hand. Here are some examples that are often used as primary sources:

- Diaries.
- Advertisements.
- Music and dance performances.
- Eyewitness accounts
- Artworks.
- Data.
- Artifacts such as tools, clothing, or other objects.
- Original documents such as tax returns, marriage licenses, and transcripts of trials.
- Journal articles that report original research for the first time (the parts about the new research, plus their data).

Secondary sources – These sources are translated, repackaged, restated, analyzed, or interpreted from a primary source. Thus, the information comes to us second-hand, or through at least one filter. Here are some examples that are often used as secondary sources:

- All nonfiction books and magazine articles other than autobiography.
- An article or website that critiques a novel, play, painting, or piece of music.
- An article or web site that synthesizes expert opinion and several eyewitness accounts for a new understanding of an event.
- The literature review portion of a journal article.

Tertiary sources – These sources further repackage the original information because they index, condense, or summarize the original. Tertiary sources are usually publications that you are not intended to read from cover to cover but to dip in and out of for the information you need. You can think of them as a good place for background information to start your research but a bad place to end up. Here are some examples that are often used as tertiary sources:

- Almanacs.
- Dictionaries.
- Guide books.
- Survey articles.
- Timelines.
- Bibliographies.
- Encyclopedias, including Wikipedia.
- Most textbooks.

Is it a primary source or a secondary source?

Deciding whether to consider a journal article a primary or a secondary source can be complicated for at least two reasons.

First, journal articles that report new research for the first time are usually based on data. Some disciplines consider the data to be the primary source, and the journal article that describes and analyzes them is considered a secondary source.

However, particularly in the sciences, the original researcher might find it difficult or impossible (they might not be allowed) to share the data. Sometimes you have nothing more first-hand than the journal article, which argues for calling it the relevant primary source because it's the closest thing that exists to the data.

Second, even journal articles that announce new research for the first time usually contain more than data. They also typically contain secondary source elements, such as a literature review, bibliography, and sections on data analysis and interpretation. They can actually be a mix of primary and secondary elements. Even so, in some disciplines, a journal article that announces new research findings for the first time is considered to be, as a whole, a primary source for the researchers using it.

What are considered primary and secondary sources can vary from discipline to discipline. If you are required to use primary sources for your research project, before getting too deep into your project check with your professor to make sure they agree with your choices. A librarian, too, can verify your choices.

Popular, professional & scholarly sources

We can also categorize information by the expertise of its intended audience. Considering the intended audience—how expert one has to be to understand the information—can indicate whether the source has sufficient credibility and thoroughness to meet your need.

There are varying degrees of expertise:

Popular – Popular newspaper and magazine articles (such as *The Walrus*, the *Globe & Mail*, and *Maclean's*) are meant for a large general audience, are generally affordable, and are easy to purchase or available for free. They are written by staff writers or reporters for the general public.

Additionally, they are:

- About news, opinions, background information, and entertainment.
- More attractive than scholarly journals, with catchy titles, attractive artwork, and many advertisements but no footnotes or references.
- Published by commercial publishers.
- Published after approval from an editor.

Professional – Professional magazine articles (such as *CPA Magazine* and *Communication World*) are meant for people in a particular profession and are often accessible through a professional organization. Staff writers or other professionals in the targeted field write these articles at a level and with the language to be understood by everyone in the profession.
Additionally, they are:

- About trends and news from the targeted field, book reviews, and case studies.
- Often less than 10 pages, some of which may contain footnotes and references.
- Usually published by professional associations and commercial publishers.
- Published after approval from an editor.

Scholarly – Scholarly journal articles (such as Journal of Management Information Systems and Business Marketing) are meant for scholars, students, and the general public who want a deep understanding of a problem or issue. Researchers and scholars write these articles to present new knowledge and further understanding of their field of study.
Additionally, they are:

- Where findings of research projects, data and analytics, and case studies usually appear first.
- Often long (usually over 10 pages) and always include footnotes and references.
- Usually published by universities, professional associations, and commercial publishers.
- Published after approval by peer review or from the journal's editor.

Attributions

2.3 Evaluating sources

Questions for reflection

- Do you evaluate information you find online or elsewhere before using it in your writing?
- What parts of evaluating sources do you find challenging? What parts are easy?
- What things do you look for to decide whether to use a source?

This section talks about how to identify relevant and credible sources that you have found online and through searches of library databases and catalogs, Google Scholar, and other specialized databases. Relevant, credible sources will meet the information needs of your research project.

Evaluating your sources is critical to the process of research. The CRAAP test allows you analyze your sources and determine if they are appropriate for your research or just plain crap! The CRAAP test uses a series of questions that address specific evaluation criteria like the authority and purpose of the source. This test should be used for all your sources and it is not intended to make you exclude your sources, but to help you to analyze how you intend to use them to support your own arguments.

C = Currency: The timeliness of the information.

- When was the information published or posted?
- Has the information been revised or updated?
- Does your topic require current information, or will older sources work as well?

R = Relevance: The importance of the information for your needs

- Does the information relate to your topic or answer your question?
- Who is the intended audience?
- Is the information at an appropriate level (i.e. not too elementary or advanced for your needs)?
- Have you looked at a variety of sources before determining this is one you will use?
- Would you be comfortable citing this source in your research paper?

A = Authority: The source of the information.

- What are the author's credentials or organizational affiliations?
- Is the author qualified to write on the topic? Do you trust the author?
- Is there contact information, such as a publisher or email address?
- Does the URL reveal anything about the author or source? examples: .ca .com .edu .gov .org .net

A= Accuracy: The reliability, truthfulness and correctness of the content.

- Where does the information come from?
- Is the information supported by evidence?
- Has the information been reviewed or refereed?
- Can you verify any of the information in another source or from personal knowledge?
- Does the language or tone seem unbiased and free of emotion?
- Are there spelling, grammar or typographical errors?

P = Purpose: The reason the information exists.

- What is the purpose of the information? Is it to inform, teach, sell, entertain or persuade?
- Do the authors/sponsors make their intentions or purpose clear?
- Is the information fact, opinion or propaganda?
- Does the point of view appear objective and impartial?
- Are there political, ideological, cultural, religious, institutional or personal biases?

Attributions

This chapter contains information taken from Thinking Critically About Sources in Choosing & Using Sources: A Guide To Academic Research (used under a CC-BY 4.0 International license) and Evaluate What You Find With The "CRAAP Test" in Write Here, Right Now: An Interactive Introduction To Academic Writing And Research (used under a CC-BY 4.0 International license).

2.4 Citing sources

Questions for reflection

- What kind of sources have you used in the workplace? How has this differed from the kind of sources you've used in school?
- Why do you think the rules that we have around source use exist? Why do we cite sources?
- How does your culture handle using other people's ideas and words? Who "owns" an idea? How do you respectfully use someone's words?
- What questions do you have about citation?
- What's your definition of "academic integrity?"
- Do you think that the rules of "academic integrity" apply to the workplace?
- When you use researched sources, do you typically paraphrase, summarize, or quote other ideas/words?
- What do you think about when deciding whether to quote or paraphrase?
- Are you comfortable writing someone else's idea in your own words?

Karan's story

When Karan studied in India, he wasn't expected to cite. When he started studying in Canada, he was surprised by the length of the writing assignments. He didn't know how to use sources, so he copied and pasted a few paragraphs into his assignment and hoped he'd done it right.

He was worried when his teacher asked to meet with him. She said that he'd plagiarized, and that he could get into a lot of trouble. Luckily, Karan's teacher decided to help him and not report him. She explained that in North American schools, you must distinguish between what words are yours and what come from the source, and what ideas are yours and what come from the source. Karan learned to use quotation marks to show what words came from the source, and to paraphrase by never looking directly at the source.

In this section, we'll tackle how to use sources ethically, analyze them, and combine them into an effective argument.

But first: a note about the difference between workplace citation and academic citation.

In the workplace, you may often find yourself using your colleague's words without crediting them. For example, your boss might ask you to write a grant application using text from previous grant applications. Many people might work on the same document or you might update a document written by someone else.

In the workplace, your employer usually owns the writing you produce, so workplace writing often doesn't cite individual authors (though contributors are usually named in an acknowledgements section if it's a large project/report). That doesn't mean that you should take credit for someone else's work, but in general a lot of sharing and remixing goes on within an organization.

For example, say that you work in HR and have been asked to launch a search for a new IT manager. You might use a template to design the job posting or update copy of the ad you posted the last time you hired someone for this role. No one would expect you to come up with an entirely new job posting just because it was originally written by someone who's left the company.

That said, writers in the workplace often use a wide range of sources to build their credibility. Citation is not only an ethical practice, but it is also a great persuasive strategy. The citation practices you learn in school will therefore serve you well in the workplace.

In school in North America, the context is different. Unless your instructor specifically tells you otherwise, they will assume that you wrote everything in your assignment, unless you use quotation marks.

What is academic integrity?

Different universities have different definitions. Here is the definition we use at Kwantlen Polytechnic University:

> The University ascribes to the highest standards of academic integrity. Adhering to these standards of academic integrity means observing the values on which good academic work must be founded: honesty, trust, fairness, respect, and responsibility. Students are expected to conduct themselves in a manner consistent with these values. These standards of academic integrity require Students to not engage in or tolerate Integrity Violations, including falsification, misrepresentation or deception, as such acts violate the fundamental ethical principles of the University community and compromise the worth of work completed by others.
>
> You can read the full policy here.

In other words, you must take full responsibility for your work, acknowledge your own efforts, and acknowledge the contributions of others' efforts. Working/ writing with integrity requires accurately representing what you contributed as well as acknowledging how others have influenced your work. When you are a student, an accurate representation of your knowledge is important because it will allow both you and your professors to know the extent to which you have developed as a scholar.

It's worth noting that other cultures have different – equally valid – definitions of academic integrity. By making you aware of what we mean by academic integrity in this context, you can be aware of the expectations that are being placed on you.

What is plagiarism?

Let's take a look at a common definition of plagiarism. This one comes from Ohio State University's First Year Experience Office:
At any stage of the writing process, all academic work submitted to the teacher must be a result of a student's own thought, research or self-expression. When a student submits work purporting to be [their] own, but which in any way borrows organization, ideas, wording or anything else from a source without appropriate acknowledgment of the fact, [they are] engaging in plagiarism.

> Plagiarism can be intentional (knowingly using someone else's work and presenting it as your own) or unintentional (inaccurately or inadequately citing ideas and words from a source). It may be impossible for your professor to determine whether plagiarized work was intentional or unintentional.

While academic integrity calls for work resulting from your own effort, scholarship requires that you learn from others. In the world of "academic scholarship" you are actually expected to learn new things from others AND come to new insights on your own. There is an implicit understanding that as a student you will be both using other's knowledge as well as your own insights to create new scholarship. To do this in a way that meets academic integrity standards you must acknowledge the part of your work that develops from others' efforts. You do this by citing the work of others. You plagiarize when you fail to acknowledge the work of others and do not follow appropriate citation guidelines.

What is citing?

Citing is basically giving credit. If your source is well-cited, you've told the audience whose ideas/words belong to whom and you've told the audience exactly where to go to find those words.

Why cite sources?

There are many good reasons to cite sources.

To avoid plagiarism & maintain academic integrity

Misrepresenting your academic achievements by not giving credit to others indicates a lack of academic integrity. This is not only looked down upon by the scholarly community, but it is also punished. When you are a student this could mean a failing grade or even expulsion from the university.

To acknowledge the work of others

One major purpose of citations is to simply provide credit where it is due. When you provide accurate citations, you are acknowledging both the hard work that has gone into producing research and the person(s) who performed that research.

To provide credibility to your work & to place your work in context

Providing accurate citations puts your work and ideas into an academic context. They tell your reader that you've done your research and know what others have said about your topic. Not only do citations provide context for your work but they also lend credibility and authority to your claims.

For example, if you're researching and writing about sustainability and construction, you should cite experts in sustainability, construction, and sustainable construction in order to demonstrate that you are well-versed in the most common ideas in the fields. Although you can make a claim about sustainable construction after doing research only in that particular field, your claim will carry more weight if you can demonstrate that your claim can be supported by the research of experts in closely related fields as well.

Citing sources about sustainability and construction as well as sustainable construction demonstrates the diversity of views and approaches to the topic. Further, proper citation also demonstrates the ways in which research is social: no one researches in a vacuum—we all rely on the work of others to help us during the research process.

To help your future researching self & other researchers easily locate sources

Having accurate citations will help you as a researcher and writer keep track of the sources and information you find so that you can easily find the source again. Accurate citations may take some effort to produce, but they will save you time in the long run. Think of proper citation as a gift to your future researching self!

Other challenges in citing sources

Besides the clarifications and difficulties around citing that we have already considered, there are additional challenges that might make knowing when and how to cite difficult for you.

You learned how to write in a different school system

Citation practices are not universal. Different countries and cultures approach using sources in different ways. If you're new to the Canadian school system, you might have learned a different way of citing. For example, some countries have a more communal approach to sources. Others see school as "not real life," so you don't need to cite sources in the same way that you would on the job.

Not really understanding the material you're using

If you are working in a new field or subject area, you might have difficulty understanding the information from other scholars, thus making it difficult to know how to paraphrase or summarize that work properly. It can be tempting to change just one or two words in a sentence, but this is still plagiarism.

Running out of time

When you are a student taking many classes, working and/or taking care of family members, it may be hard to devote the time needed to doing good scholarship and accurately representing the sources you have used. Research takes time. The sooner you can start and the more time you can devote to it, the better your work will be.

Shifting cultural expectations of citation

Because of new technologies that make finding, using, and sharing information easier, many of our cultural expectations around how to do that are changing as well. For example, blog posts often "reference" other articles or works by simply linking to them. It makes it easy for the reader to see where the author's ideas have come from and to view the source very quickly. In these more informal writings, blog authors do not have a list of citations (bibliographic entries). The links do the work for them. This is a great strategy for online digital mediums, but this method fails over time when links break and there are no hints (like an author, title and date) to know how else to find the reference, which might have moved.

This example of a cultural change of expectations in the non-academic world might make it seem that there has been a change in academic scholarship as well, or might make people new to academic scholarship even less familiar with citation. But in fact, the expectations around citing sources in academic research remain formal.

How to cite sources

Now that we know why we cite, so let's learn *how* to cite. Citation and source use are all about balance. If you don't use enough sources, you might struggle to make a thorough argument. If you cite too much, you won't leave room for your own voice in your piece.

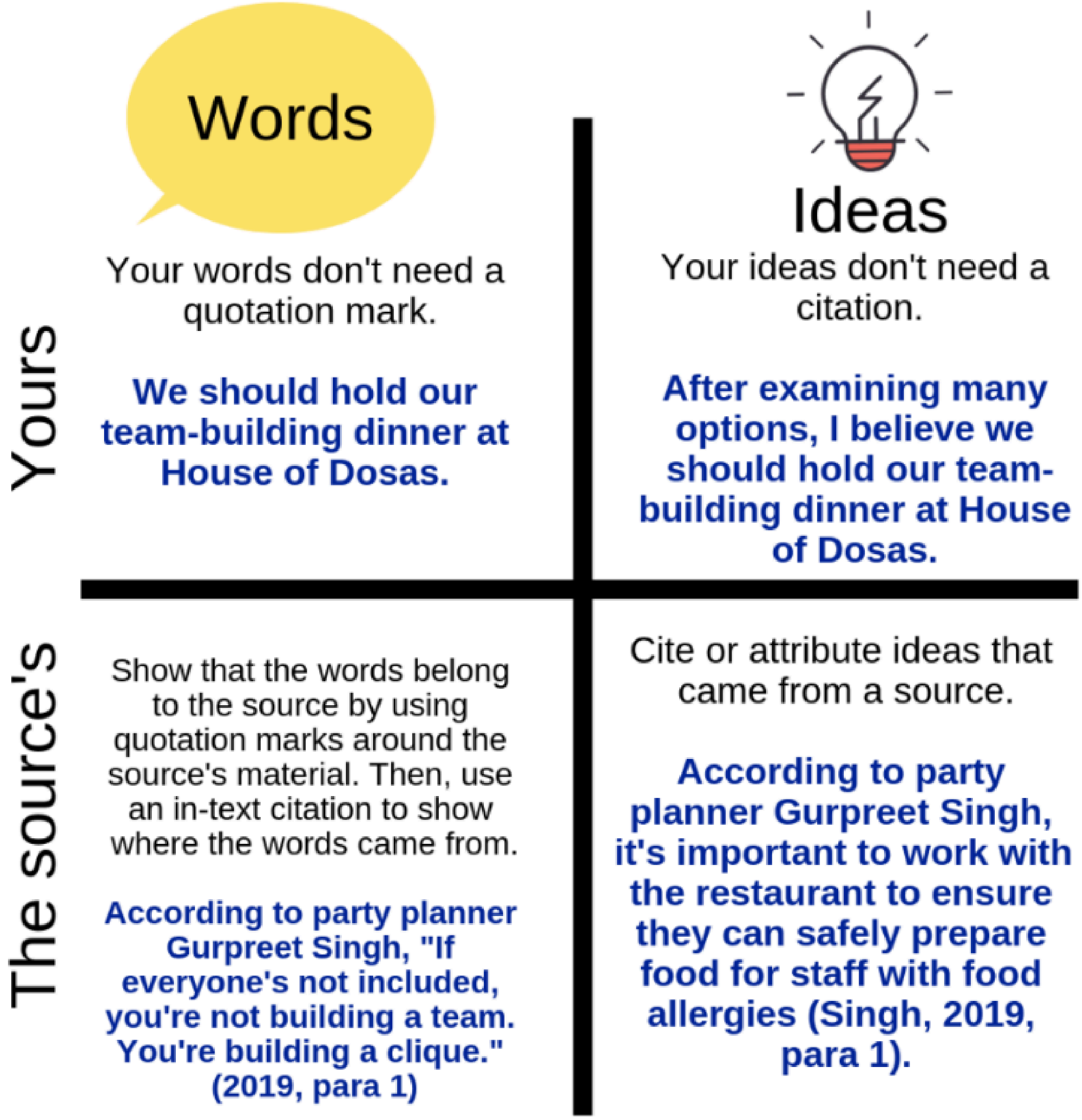
To illustrate this point, think of a lawyer arguing a case in a trial. If the lawyer just talks to the jury and doesn't call any witnesses, they probably won't win the case. After all, a lawyer isn't an expert in forensics or accident reconstruction or Internet fraud. The lawyer also wasn't there when the incident occurred. That's where witnesses come in. The witnesses have knowledge that the lawyer doesn't.

But if the lawyer just lets the witnesses talk and sits there quietly, they'll likely also lose the case. That's because the lawyer is the one who's making the overall argument. The lawyer asks the witnesses questions and shows how the testimony of different witnesses piece together to prove the case.

To cite sources, you should make two things clear:

- The difference between your words and the source's words.
- The difference between your ideas and the source's ideas.

This diagram illustrates the difference:



Attributing a source's words

When you quote someone in your document, you're basically passing the microphone to them. Inviting another voice into your piece means that the **way** that person said something is important. Maybe that person is an expert and their words are a persuasive piece of evidence. Maybe you're using the words as an example. Either way, you'll likely do some sort of analysis on the quote.

When you use the source's words, put quotation marks around them. This creates a visual separation between what you say and what your source says. You also don't just want to drop the quote into the document with no explanation. Instead, you should build a "frame" around the quote by explaining who said it and why it's important. In short, you surround the other person's voice with your own voice.

Tip: The longer the source, the more analysis you're likely going to do.

Here's an example of a way to integrate a quote within a paragraph.

According to Haudenosaunee writer Alicia Elliot (2019, p. 18), "We know our cultures have meaning and worth, and that culture lives and breathes inside our languages." **Here, Elliot shows that when Indigenous people have the opportunity to learn Indigenous languages, which for generations were intentionally suppressed by the Canadian government, they can connect with their culture in a new way.**

As you can see, Elliot's words are important. If you tried to paraphrase them, you'd lose the meaning. Elliot is also a well-known writer, so adding her voice into the document adds credibility. If you're writing about Indigenous people, it's also important to include the voices of Indigenous people in your work.

You can see that in this example, the author doesn't just pass the microphone to Alicia Elliot. Instead, they surround the quote with their own words, explaining who said the quote and why it's important.

Attributing the source's ideas

When the source's ideas are important, you'll want to paraphrase. For example, Elliot goes on to say that when over half of Indigenous people in a community speak an Indigenous language, the suicide rate goes down (2019). Here, it's the idea that's important, not the words, so you should **paraphrase** it.

What is paraphrasing? Paraphrasing is when you restate an idea in your own words. It's this last bit — the "own words" part – that is confusing. What counts as your own words?

When you're paraphrasing, you should ask yourself, "Have I restated this in a way that shows that I understand it?" If you simply swap out a few words for synonyms, you haven't shown that you understand the idea. For example, let's go back to that Alicia Elliot quote: "We know our cultures have meaning and worth, and that culture lives and breathes inside our languages." What if I swapped out a few words so it said "We know our cultures have **value** and **importance**, and that culture lives and **exhale**s inside our languages."?

Does this show that I understand the quote? No. Elliot composed that line with a lot of precision and thoughtfulness. Switching a few words around actually shows disrespect for the care she took with her language.

Instead, paraphrase by not looking at the source material. Put down the book or turn off your computer monitor, then describe the idea back as if you were speaking to a friend.

What information do I cite?

Citing sources is often depicted as a straightforward, rule-based practice. In fact, there are many grey areas around citation, and learning how to apply citation guidelines takes practice and education. If you are confused by it, you are not alone – in fact you might be doing some good thinking. Here are some guidelines to help you navigate citation practices.

Cite when you are directly quoting. This is the easiest rule to understand. If you are stating word for word what someone else has already written, you must put quotes around those words and you must give credit to the original author. Not doing so would mean that you are letting your reader believe these words are your own and represent your own effort.

Cite when you are summarizing and paraphrasing. This is a trickier area to understand. First of all, summarizing and paraphrasing are two related practices but they are not the same. Summarizing is when you read a text, consider the main points, and provide a shorter version of what you learned. Paraphrasing is when you restate what the original author said in your own words and in your own tone. Both summarizing and paraphrasing require good writing skills and an accurate understanding of the material you are trying to convey. Summarizing and paraphrasing are not easy to do when you are a beginning academic researcher, but these skills become easier to perform over time with practice.

Cite when you are citing something that is highly debatable. For example, if you want to claim that an oil pipeline is necessary for economic development, you will have to contend with those who say that it produces few jobs and has a high risk of causing an oil spill that would be devastating to wildlife and tourism. To do so, you'll need experts on your side.

When don't you cite?

Don't cite when what you are saying is your own insight. Research involves forming opinions and insights around what you learn. You may be citing several sources that have helped you learn, but at some point you are integrating your own opinion, conclusion, or insight into the work. The fact that you are NOT citing it helps the reader understand that this portion of the work is your unique contribution developed through your own research efforts.

Don't cite when you are stating common knowledge. What is common knowledge is sometimes difficult to discern. Generally quick facts like historical dates or events are not cited because they are common knowledge.

Examples of information that would not need to be cited include:

- Partition in India happened on August 15, 1947.
- Vancouver is the 8th biggest city in Canada.

Some quick facts, such as statistics, are trickier. A guideline that can help with determining whether or not to cite facts is to determine whether the same data is repeated in multiple sources. If it is not, it is best to cite.

The other thing that makes this determination difficult might be that what seems new and insightful to you might be common knowledge to an expert in the field. You have to use your best judgment, and probably err on the side of over-citing, as you are learning to do academic research. You can seek the advice of your instructor, a writing tutor, or a librarian. Knowing what is and is not common knowledge is a practiced skill that gets easier with time and with your own increased knowledge.

Creating in-text citations and references

Now that we know what to cite and how to quote and paraphrase, we need to decide what format to create our in-text citations and references. Your instructor will tell you whether they prefer MLA, APA, Chicago or another style format. Luckily, the Kwantlen Library librarians have come up with handy citation guides, which you can access on the Citation Styles section of the KPU website.

When to quote, paraphrase, or summarize

To build everything but the research question, you will need to summarize, paraphrase, and/or directly quote your sources. But how should you choose what technique to use when?

Choose a direct quote when it is more likely to be accurate than would summarizing or paraphrasing; when what you're quoting is the text you're analyzing; when a direct quote is more concise that a summary or paraphrase would be and conciseness matters; when the author is a particular authority whose exact words would lend credence to your argument; and when the author has used particularly effective language that is just too good to pass up.

Choose to paraphrase or summarize rather than to quote directly when the meaning is more important than the particular language the author used and you don't need to use the author's preeminent authority to bolster your argument at the moment.

Choose to paraphrase instead of summarizing when you need details and specificity. Paraphrasing lets you emphasize the ideas in resource materials that are most related to your term paper or essay instead of the exact language the author used. It also lets you simplify complex material, sometimes rewording to use language that is more understandable to your reader.

Choose to summarize instead of paraphrasing when you need to provide a brief overview of a larger text. Summaries let you condense the resource material to draw out particular points, omit unrelated or unimportant points, and simplify how the author conveyed his or her message.

Attributions

2.5 Making an argument

Questions for reflection

- Have you ever argued with someone online? If so, how did you present your argument? Was your argument successful?
- How do people create arguments in your area of study or career path? Are there certain ethical rules that people in your industry must follow?
- How do people argue in your culture? Do you argue with everyone the same way (an elder vs. someone your age)?
- Do you think it's possible to change someone's mind using logic?
- Do you find it easier to create an argument in writing or in person? Why?

Making an argument

Making an argument means trying to convince others that you are correct as you describe a thing, situation, or phenomenon and/or persuade them to take a particular action. Important not just in university, that skill will be necessary for nearly every professional job you hold.

Realizing that your research report, essay, blog post, or oral presentation is to make an argument gives you a big head start because right off you know the sources you're going to need are those that will let you write the components of an argument for your reader.

It's no accident that people are said to make arguments. They are constructed from components that act like building blocks. The components are selected because of what they contribute to the argument. The components generally, though not always, appear in a certain order because they build on or respond to one another.

Components of an argument

Making an argument in a report, term paper, or other college writing task is like laying out a case in court. Just as there are conventions that lawyers must adhere to as they make their arguments in court, there are conventions in arguments made in university assignments. Among those conventions is to use the components of an argument.

One common arrangement for an argument is to begin with an introduction that explains why the situation is important—why the reader should care about it. Your research question will probably not appear here, but your answer to it (your thesis or claim) usually appears as the last sentence or two of the introduction.

The body of your essay or paper follows and consists of:

- Your reasons the thesis or claim is correct or at least reasonable.
- The evidence that supports each reason, often occurring right after the reason the evidence supports.
- An acknowledgement that some people have/could have objections, reservations, counterarguments, or alternative solutions to your argument and a statement of each. (Posters often don't have room for this component.)
- A response to each acknowledgement that explains why that criticism is incorrect or not very important. Sometimes you might have to concede a point you think is unimportant, if you can't really refute it.
- After the body, the paper or essay ends with a conclusion, which states your thesis in a slightly different way than occurred in the introduction. The conclusion also may mention why research on this situation is important. Sometimes recommendations also follow based on the argument made and conclusions stated.

For example, the thesis or claim is derived from the initial question. The reasons are bolstered by evidence to support the claim. Objections are raised, acknowledged and subsequently responded to.

Attributions

2.6 Annotated bibliography

An annotated bibliography is a descriptive and evaluative list of citations for books, articles, or other documents. Each citation is followed by a brief paragraph – the annotation – alerting the reader to the accuracy, quality, and relevance of that source.

Composing an annotated bibliography helps you to gather your thoughts on how to use the information contained in the cited sources, and it helps the reader to decide whether to pursue the full context of the information you provide.

Depending on the purpose of your bibliography, different elements will be more important and some may not be important at all. Your instructor may also have guidelines or be able to talk about priorities.

While an annotation can be as short as one sentence, the average entry in an annotated bibliography consists of a work's citation information followed by a short paragraph. The annotated bibliography may potentially include:

- **Author information**
  Who is the author? What is her/his background? Is the author qualified to write this document?
- **Author's purpose**
  What is the author's purpose in writing this article or doing this research? Is the purpose stated or implied? Does the author have a particular message?
- **Audience information**
  To what audience is the author writing (scholars, teachers, the general public, etc.)? Is this reflected in the author's style of writing or presentation?
- **Author bias**
  Does the author show any biases or make assumptions upon which the rationale of the article rests? If so, what are they?
- **Information source**
  What methods did the author use to obtain the data? Is the article based on personal opinion, experience, interviews, library research, questionnaires, laboratory experiments, empirical observation, or standardized personality tests?
- **Author conclusion**
  What conclusions does the author draw? Are these conclusions specifically stated or implied?
- **Conclusion justification**
  Are the conclusions justified from the research or experience? Are the conclusions in sync with the original purpose of the research and supported by the data? Are the conclusions skewed by bias?
- **Relationship to other works**
  How does this work compare with others cited? Does it conflict with conventional wisdom, established scholarship, government policy, etc.? Are there specific studies or writings cited with which this one agrees or disagrees? Are there any opinions not cited of which readers should be aware? Is the evidence balanced or weighted in favor of a particular perspective?
- **Time frame**
  Is the work current? Is this important? How does the time in which it was written reflect on the information contained in this work?
- **Significant attachments**
  Are there significant attachments such as appendices, bibliographies, illustrations, etc.? Are they valuable or not? If there are none, should there be?

Your instructor may have specific requirements for what your annotated bibliography should address.

Sample annotated bibliography entry using APA style (Trent University, 2019)

Morey, D. F. (2006). Burying key evidence: The social bond between dogs and people. Journal of Archaeological Science, 33, 158-175. doi: http://dx.doi.org/10.1016/j.jas.2005.07.009

In this article, Morey documents the widespread human practice of burying domesticated dogs and questions what this practice can reveal about relationships between the two **[This sentence demonstrates the topic of the article]**. He argues that dog burials have been more frequent and more consistent than burials of other types of animals, suggesting that humans have invested dogs with spiritual and personal identities. Morey also demonstrates that the study of dog burials can help scholars to more accurately date the domestication of dogs; thus, he challenges scholars who rely solely on genetic data in their dating of domestication to consider more fully the importance of archaeological finds **[The previous 2 sentences explain the article's argument]**. To support his arguments, Morey provides detailed data on the frequency, geographic and historical distribution, as well as modes of dog burials and compares the conclusions he draws from this data to those found by scholarship based on genetic data **[This sentence gives an overview of the method used in the article]**. This article is useful to a literature review on the domestication of dogs because it persuasively shows the importance of using burial data in dating dog domestication and explains how use of this data could change assessments of when domestication occurred **[This sentence explains the relevance of the article to the assigned topic]**.

Reference

Trent University. (2019). *How to create an annotated bibliography*. Retrieved from https://www.trentu.ca/academicskills/how-guides/how-write-university/how-approach-any-assignment/how-create-annotated-bibliography.

Attributions

PART 3: PLANNING MESSAGES

3.1 Pre-writing

If you think that a blank sheet of paper or a blinking cursor on the computer screen is a scary sight, you are not alone. Many writers, students, and employees find that beginning to write can be intimidating. When faced with a blank page, however, experienced writers remind themselves that writing, like other everyday activities, is a process. Every process, from writing to cooking, bike riding, and learning to use a new cell phone, will get significantly easier with practice.

Just as you need a recipe, ingredients, and proper tools to cook a delicious meal, you also need a plan, resources, and adequate time to create a good business message. In other words, writing is a process that requires following steps and using strategies to accomplish your goals.

Let's begin by thinking about your current writing process.

Questions for reflection

1. Describe your writing process. How do you tackle writing tasks?
2. What do you think the role of your writing teacher should be?
3. Describe a time when you wrote something you're proud of. How did you get started? What conditions did you write under? Did you revise?
4. How do you normally complete an assignment? Do you feel that this method is successful?
5. If you write in more than one language, do you use the same writing process for each language you write? How are your writing processes the same and different?

What role do emotions play in writing?

Because this is a business writing class, it might seem weird to talk about feelings. But how you feel about a writing task often determines how effectively you can complete it. For example, have you ever struggled to write an apology to someone you upset? Have you ever found yourself procrastinating to write an assignment you don't really understand? Have you ever found that it's easier for you to seem to write better in some classes more than others?

Emotions are the reason that sometimes you can write without thinking and sometimes you find yourself procrastinating, then staring at a blank screen, typing and deleting the same words over and over, feeling your writing becoming more awkward rather than less. That's why simply acknowledging how you feel can help you avoid procrastination.

The first step is acknowledging how you feel, and the second step is figuring out why you feel that way. For example, some students have negative feelings about a writing assignment because they don't like the teacher (or a teacher they had years ago), or they've had past struggles in a subject, or they don't understand the point of the assignment, or they're overwhelmed with other classes. Being able to identify why you're feeling an emotion takes the power out of it. Sometimes you can even find a solution to make the writing task easier.

Here are some stories about how student writers changed their writing processes.

Raveena's Story

Whenever Raveena writes, she feels a little editor on her shoulder who's always chiming in correcting her grammar and telling her that her sentences are awkward and sloppy. She spends so much time editing while she writes that she loses her train of thought and has trouble just letting her thoughts flow. Writing a single page takes her hours.

Raveena's instructor asked if she had always written this way. Raveena said she used to write easily, but during her first semester of university she had a couple of instructors who were tough graders. Whenever she would write, she would imagine her instructors criticizing her. Raveena's instructor suggested two solutions:

1) She should pretend to write to someone she likes. It's easier to write to a friendly reader than a hostile one. Raveena imagined writing to her favourite cousin and writing got a little easier.

2) She asked Raveena to put a piece of paper over her laptop screen or turn the screen's brightness to the lowest setting, then type out her thoughts. At first, Raveena found this very uncomfortable. When she turned her screen back on, she saw a jumble of text. But Raveena soon discovered that she had quickly written 500 words, which would have taken her hours under her old method. Raveena then used her excellent editing skills to shape what she had written.

Kai's Story

Kai prided themself on being able to write their essays the night before. They would drink some energy drinks and buy their favourite snacks and write for hours. They rarely revised their work. This technique worked well in high school, but when they got to university their grades started slipping. Their instructors noted that they had great ideas, but many were not well-organized or were incomplete.

Kai's instructor asked the class to bring a draft for a peer workshop. Kai told their instructor that they wouldn't be able to write a draft, since they could only write well the night before the assignment was due. Kai's instructor asked them what they liked about writing at night. Kai said that they liked how quiet it was in the house at 3 a.m. and how the pressure made them focus. Kai's instructor asked them to try to replicate the same environment (dark room, snacks, drinks etc.), set a timer for 2 hours and see how much they could write. Kai was able to write a rough draft of their assignment, though they didn't feel the "writing magic" in the same way.

During the workshop, Kai's classmates offered several useful suggestions for improvement, but they were worried about overthinking things and ruining them by doing too much revision. Kai's instructor told them to save the rough draft as a different file. If they didn't like the revisions, they could go back to the previous draft. Kai tried a number of revision techniques and ended up with a much stronger assignment. Slowly, they used more and more revision techniques in their other assignments. The result: higher grades and more sleep.

If your writing process is working for you, then there's no need to change it. But if the way you write frustrates you, consider making some changes. You might also consider changing your writing process for certain writing tasks, such as important assignments.

What is effective writing?

Effective writing can be simply described as good ideas that are expressed and arranged in a way your audience understands. Although many more pre-writing strategies exist, this chapter covers six: using experience and observations, freewriting, asking questions, brainstorming, idea mapping, and searching the internet. Using the strategies in this chapter can help you overcome the fear of the blank page and confidently begin the writing process.

Definition

Pre-writing is the stage of the writing process during which you transfer your abstract thoughts into more concrete ideas in ink on paper (or in type on a computer screen). Although pre-writing techniques can be helpful in all stages of the writing process, the following six strategies are best used when initially deciding on a topic:

1. Using experience and observations
2. Freewriting
3. Asking questions
4. Brainstorming
5. Idea mapping
6. Searching the internet

In addition to understanding that writing is a process, writers also understand that choosing a good general topic for an assignment is an essential step. Sometimes your instructor will give you an idea to begin an assignment, and other times your instructor will ask you to come up with a topic on your own. A good topic not only covers what an assignment will be about but also fits the assignment's purpose.

The first important step is for you to tell yourself why you are writing (to inform, to explain, or some other purpose) and for whom you are writing. Write your purpose and your audience on your own sheet of paper.

Using experience and observations

When selecting a topic, you may also want to consider something that interests you or something based on your own life and personal experiences. Even everyday observations can lead to interesting topics. After writers think about their experiences and observations, they often take notes on paper to better develop their thoughts. These notes help writers discover what they have to say about their topic.

Freewriting

Freewriting is an exercise in which you write freely about any topic for a set amount of time (usually three to five minutes). During the time limit, you may jot down any thoughts that come to your mind. Try not to worry about grammar, spelling, or punctuation. Instead, write as quickly as you can without stopping. If you get stuck, just copy the same word or phrase over and over until you come up with a new thought.

Writing often comes easier when you have a personal connection with the topic you have chosen. Remember, to generate ideas in your freewriting, you may also think about readings that you have enjoyed or that have challenged your thinking. Doing this may lead your thoughts in interesting directions.

Quickly recording your thoughts on paper will help you discover what you have to say about a topic. When writing quickly, try not to doubt or question your ideas. Allow yourself to write freely and without being self-conscious. Once you start writing with few limitations, you may find you have more to say than you first realized. Your flow of thoughts can lead you to discover even more ideas about the topic. Freewriting may even lead you to discover another topic that excites you even more.

Asking questions

Who? What? Where? When? Why? How? In everyday situations, you pose these kinds of questions to get more information. Who will be my partner for the project? When is the next meeting? Why is my car making that odd noise?

You seek the answers to these questions to gain knowledge, to better understand your daily experiences, and to plan for the future. Asking these types of questions will also help you with the writing process. As you choose your topic, answering these questions can help you revisit the ideas you already have and generate new ways to think about your topic. You may also discover aspects of the topic that are unfamiliar to you and that you would like to learn more about. All these idea-gathering techniques will help you plan for future work on your assignment.

Pre-writing is very purpose driven; it does not follow a set of hard-and-fast rules. The purpose of pre-writing is to find and explore ideas so that you will be prepared to write. A pre-writing technique like asking questions can help you both find a topic and explore it. The key to effective pre-writing is to use the techniques that work best for your thinking process. Freewriting may not seem to fit your thinking process, but keep an open mind. It may work better than you think.

Brainstorming

Brainstorming is similar to list making. You can make a list on your own or in a group with your classmates. Start with a blank sheet of paper (or a blank computer document) and write your general topic across the top. Underneath your topic, make a list of more specific ideas. Think of your general topic as a broad category and the list items as things that fit in that category. Often you will find that one item can lead to the next, creating a flow of ideas that can help you narrow your focus to a more specific paper topic.

Idea mapping

Idea mapping allows you to visualize your ideas on paper using circles, lines, and arrows. This technique is also known as clustering because ideas are broken down and clustered or grouped together. Many writers like this method because the shapes show how the ideas relate or connect, and writers can find a focused topic from the connections mapped. Using idea mapping, you might discover interesting connections between topics that you had not thought of before.

To create an idea map, start with your general topic in a circle in the center of a blank sheet of paper. Then write specific ideas around it and use lines or arrows to connect them together. Add and cluster as many ideas as you can think of.

Searching the internet

Using search engines on the internet are good ways to see what kinds of websites are available on your topic. Writers use search engines not only to understand more about the topic's specific issues but also to get better acquainted with their audience. Be choosy about the websites you use. Make sure they are reliable sources for the kind of information you seek.

When you search the internet, type some key words from your broad topic or words from your narrowed focus into your browser's search engine (many good general and specialized search engines are available for you to try). Then look over the results for relevant and interesting articles.

Results from an internet search show who is talking about the topic, how the topic is being discussed, and what specific points are currently being discussed about the topic. If the search engine results are not what you are looking for, revise your key words and search again. Some search engines also offer suggestions for related searches that may give you better results.

Not all the results online search engines return will be useful or reliable. Give careful consideration to the reliability of an online source before selecting a topic based on it. Remember that factual information can be verified in other sources, both online and in print. If you have doubts about any information you find, either do not use it or identify it as potentially unreliable.

Want to switch up your writing process?

Here are some ideas if you're getting stuck. They can be used both in school and in the workplace.

Ways to switch up your writing process

Here are some simple ways to change your writing process. Pick a few and try them.

Pre-Writing

1. Read the assignment prompt, then quickly write down 5 things you'll need to do to be successful in the assignment. Using this list and the assignment prompt, create a timeline for finishing the assignment. For example, if you're being graded on using primary and secondary research, you'll want to make time to research, analyze your sources and add your citations.
2. Go for a walk (or do some exercise) and think about your writing task. Sometimes moving your body helps you do brainstorming.

3. Create an outline for your work.
4. Use brainstorming (mind mapping, bubble maps, etc).
5. Try illustrating your project visually. Connect ideas and thoughts with lines.
6. Read a similar document to get ideas.
7. Talk about your writing task with a friend.
8. Represent your writing task visually. Sometimes creating a comic strip or series of doodles helps you to figure out where to start.

Writing

1. Turn off the screen of your computer and try writing your document. This will help you get your thoughts down without worrying about editing.
2. Use the voice recorder in your phone to record yourself describing what you want to write about as if to a friend.
3. Write an imaginary conversation between your sources. How would they respond to each other?
4. Try free-writing. Write the phrase "What I want my reader to know is…" or "The most surprising thing about my research is…" Then, set a timer for 5 minutes and write about this topic. Don't stop writing. Ignore all grammar and spelling errors. See how much you can write.
5. Schedule a time each day to write and put it in your calendar.
6. Try to Pomodoro Technique, where you work intensely for 25 minutes then take a 5 minute break.
7. Use website blocking software like Freedom, FocusBooster or StayFocusd to block your internet use for a few hours so you can concentrate.

Revising

1. Read your work out loud. The ear is a better editor than the eye.
2. Leave your work overnight so that you can come back to it with fresh eyes.
3. Describe your work to a trusted friend or family member and encourage them to ask you questions.
4. Compare your work to the assignment prompt or rubric. Read a criteria/rubric point then go to your work and underline where in the work you met the criteria.
5. Print your work out and cut it up so that each paragraph is on its own piece of paper. Try reorganizing your paragraphs. Does another order work better?
6. If your writing uses sources, print your work out and highlight every time you use a source. If your writing has no highlighted parts, you might want to add sources. If your writing is mostly highlighted, you might want to do more analysis of the sources.
7. Underline the main point of each paragraph. If you can't point out what the point of the paragraph is, you may need to rethink it. If your paragraph has multiple points, you may need to break it up.
8. Show your work to your teacher, a colleague or friend and ask them what they think the goal of

the assignment is.

Attributions

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3.2 Communication models

Communication is a complex process, and it is difficult to determine where or with whom a communication encounter starts and ends. It can sometimes be helpful to consider different communication models. Below are some questions to help guide you through this chapter.

Questions for reflection

- Why do models (of anything) matter in the real world?
- What value do communication models have?
- What communication models do you know about already?
- How can learning about communication models be helpful to you?

Models of communication simplify the process by providing a visual representation of the various aspects of a communication encounter. Some models explain communication in more detail than others, but even the most complex model still doesn't recreate what we experience in even a moment of a communication encounter. Models still serve a valuable purpose for students of communication because they allow us to see specific concepts and steps within the process of communication, define communication, and apply communication concepts. When you become aware of how communication functions, you can think more deliberately through your communication encounters, which can help you better prepare for future communication and learn from your previous communication. The three models of communication we will discuss are the transmission, interaction, and transaction models.

Although these models of communication differ, they contain some common elements. The first two models we will discuss, the transmission model and the interaction model, include the following parts: participants, messages, encoding, decoding, and channels. In communication models, the participants are the senders and/or receivers of messages in a communication encounter. The message is the verbal or nonverbal content being conveyed from sender to receiver. For example, when you say "Hello!" to your friend, you are sending a message of greeting that will be received by your friend.

The internal cognitive process that allows participants to send, receive, and understand messages is the encoding and decoding process. Encoding is the process of turning thoughts into communication. As we will learn later, the level of conscious thought that goes into encoding messages varies. Decoding is the process of turning communication into thoughts. For example, you may realize you're hungry and encode the following message to send to your roommate: "I'm hungry. Do you want to get pizza tonight?" As your roommate receives the message, they decode your communication and turn it back into thoughts in order to make meaning out of it. Of course, we don't just communicate verbally—we have various options, or channels for communication. Encoded messages are sent through a channel, or a sensory route on which a message travels, to the receiver for decoding. While communication can be sent and received using any sensory route (sight, smell, touch, taste, or sound), most communication occurs through visual (sight) and/or auditory (sound) channels. If your roommate has headphones on and is engrossed in a video game, you may need to get their attention by waving your hands before you can ask them about dinner.

Linear model of communication

The linear or transmission model of communication, as shown in Figure 2.2.1, describes communication as a linear, one-way process in which a sender intentionally transmits a message to a receiver (Ellis & McClintock, 1990). This model focuses on the sender and message within a communication encounter. Although the receiver is included in the model, this role is viewed as more of a target or end point rather than part of an ongoing process. We are left to presume that the receiver either successfully receives and understands the message or does not. The scholars who designed this model extended on a linear model proposed by Aristotle centuries before that included a speaker, message, and hearer. They were also influenced by the advent and spread of new communication technologies of the time such as telegraphy and radio, and you can probably see these technical influences within the model (Shannon & Weaver, 1949). Think of how a radio message is sent from a person in the radio studio to you listening in your car. The sender is the radio announcer who encodes a verbal message that is transmitted by a radio tower through electromagnetic waves (the channel) and eventually reaches your (the receiver's) ears via an antenna and speakers in order to be decoded. The radio announcer doesn't really know if you receive their message or not, but if the equipment is working and the channel is free of static, then there is a good chance that the message was successfully received.

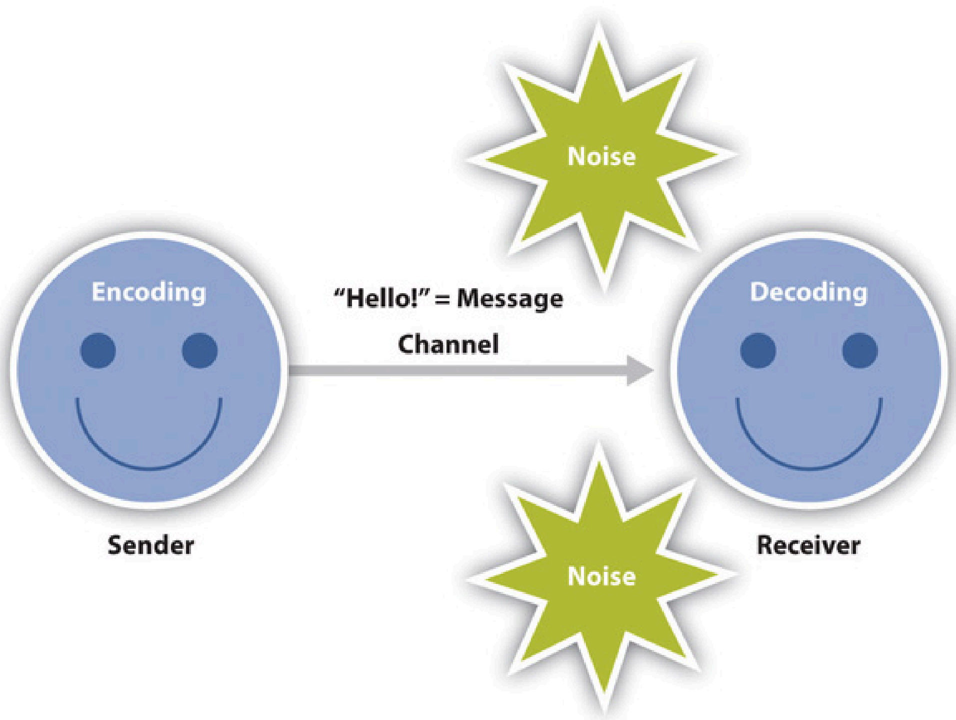

Figure 2.2.1 The linear model of communication

Although the transmission model may seem simple or even underdeveloped to us today, the creation of this model allowed scholars to examine the communication process in new ways, which eventually led to more complex models and theories of communication.

Interactive model of communication

The interactive or interaction model of communication, as shown in Figure 2.2.2, describes communication as a process in which participants alternate positions as sender and receiver and generate meaning by sending messages and receiving feedback within physical and psychological contexts (Schramm, 1997). Rather than illustrating communication as a linear, one-way process, the interactive model incorporates feedback, which makes communication a more interactive, two-way process. Feedback includes messages sent in response to other messages. For example, your instructor may respond to a point you raise during class discussion or you may point to the sofa when your roommate asks you where the remote control is. The inclusion of a feedback loop also leads to a more complex understanding of the roles of participants in a communication encounter. Rather than having one sender, one message, and one receiver, this model has two sender-receivers who exchange messages. Each participant alternates roles as sender and receiver in order to keep a communication encounter going. Although this seems like a perceptible and deliberate process, we alternate between the roles of sender and receiver very quickly and often without conscious thought.

The interactive model is also less message focused and more interaction focused. While the linear model focused on how a message was transmitted and whether or not it was received, the interactive model is more concerned with the communication process itself. In fact, this model acknowledges that there are so many messages being sent at one time that many of them may not even be received. Some messages are also unintentionally sent. Therefore, communication isn't judged effective or ineffective in this model based on whether or not a single message was successfully transmitted and received.

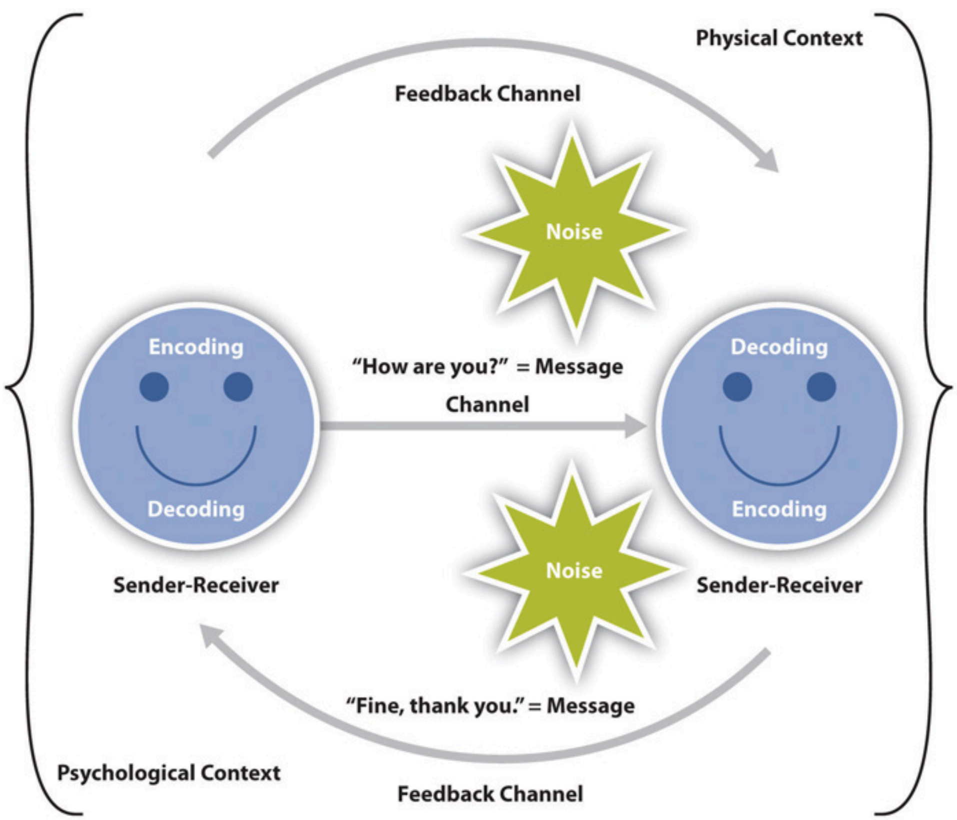

Figure 2.2.2 The interactive model of communication

The interactive model takes physical and psychological context into account. Physical context includes the environmental factors in a communication encounter. The size, layout, temperature, and lighting of a space influence our communication. Imagine the different physical contexts in which job interviews take place and how that may affect your communication. I have had job interviews over the phone, crowded around a table with eight interviewers, and sitting with few people around an extra large conference table. I've also been walked around an office to unexpectedly interview one-on-one, in succession, with multiple members of a search committee over a period of three hours. Whether it's the size of the room or other environmental factors, it's important to consider the role that physical context plays in our communication. Psychological context includes the mental and emotional factors in a communication encounter. Stress, anxiety, and emotions are just some examples of psychological influences that can affect our communication. Seemingly positive psychological states, like experiencing the emotion of love, can also affect communication. Feedback and context help make the interaction model a more useful illustration of the communication process, but the transaction model views communication as a powerful tool that shapes our realities beyond individual communication encounters.

Transaction model of communication

As the study of communication progressed, models expanded to account for more of the communication process. Many scholars view communication as more than a process that is used to carry on conversations and convey meaning. We don't send messages like computers, and we don't neatly alternate between the roles of sender and receiver as an interaction unfolds. We also can't consciously decide to stop communicating because communication is more than sending and receiving messages. The transaction model differs from the transmission and interaction models in significant ways, including the conceptualization of communication, the role of sender and receiver, and the role of context (Barnlund, 1970).

The transaction model of communication describes communication as a process in which communicators generate social realities within social, relational, and cultural contexts. In this model, which is shown in Figure 2.2.3, we don't just communicate to exchange messages; we communicate to create relationships, form intercultural alliances, shape our self-concepts, and engage with others in dialogue to create communities.

The roles of sender and receiver in the transaction model of communication differ significantly from the other models. Instead of labeling participants as senders and receivers, the people in a communication encounter are referred to as communicators. Unlike the interactive model, which suggests that participants alternate positions as sender and receiver, the transaction model suggests that we are simultaneously senders and receivers. This is an important addition to the model because it allows us to understand how we are able to adapt our communication—for example, a verbal message—in the middle of sending it based on the communication we are simultaneously receiving from our communication partner.

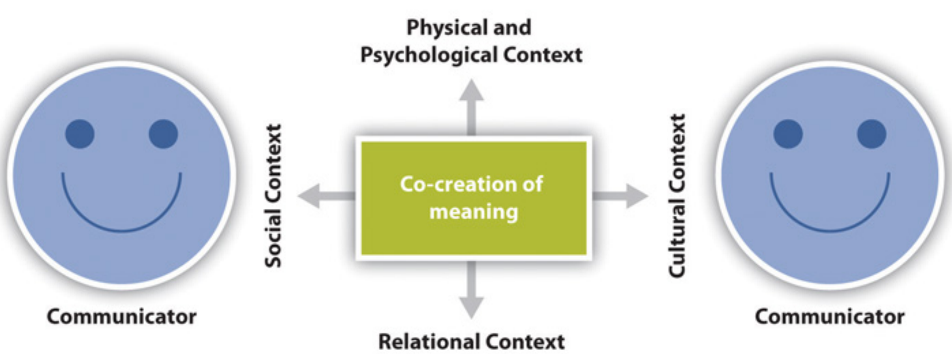

Figure 2.2.3 The transaction model of communication

The transaction model also includes a more complex understanding of context. The interaction model portrays context as physical and psychological influences that enhance or impede communication. While these contexts are important, they focus on message transmission and reception. Since the transaction model of communication views communication as a force that shapes our realities before and after specific interactions occur, it must account for contextual influences outside of a single interaction. To do this, the transaction model considers how social, relational, and cultural contexts frame and influence our communication encounters.

Social context refers to the stated rules or unstated norms that guide communication. Norms are social conventions that we pick up on through observation, practice, and trial and error. We may not even know we are breaking a social norm until we notice people looking at us strangely or someone corrects or teases us. Relational context includes the previous interpersonal history and type of relationship we have with a person. We communicate differently with someone we just met versus someone we've known for a long time. Initial interactions with people tend to be more highly scripted and governed by established norms and rules, but when we have an established relational context, we may be able to bend or break social norms and rules more easily. Cultural context includes various aspects of identities such as race, gender, nationality, ethnicity, sexual orientation, class, and ability. We all have multiple cultural identities that influence our communication. Some people, especially those with identities that have been historically marginalized, are regularly aware of how their cultural identities influence their communication and influence how others communicate with them. Conversely, people with identities that are dominant or in the majority may rarely, if ever, think about the role their cultural identities play in their communication. Cultural context is influenced by numerous aspects of our identities and is not limited to race or ethnicity.

References

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Attribution

3.3 Audience analysis

John Thill and Courtland Bovee (Thill & Bovee, 2004), two leading authors in the field of business communication, have created a checklist for planning business messages. The following twelve-item checklist, adapted here, serves as a useful reminder of the importance of preparation in the writing process:

1. Determine your general purpose: are you trying to inform, persuade, entertain, facilitate interaction, or motivate a reader?
2. Determine your specific purpose (the desired outcome).
3. Make sure your purpose is realistic.
4. Make sure your timing is appropriate.
5. Make sure your sources are credible.
6. Make sure the message reflects positively on your business.
7. Determine audience size.
8. Determine audience composition.
9. Determine audience knowledge and awareness of topic.
10. Anticipate probable responses.
11. Select the correct channel.
12. Make sure the information provided is accurate, ethical, and pertinent.

Throughout the next few chapters, we will examine these various steps in greater detail.

The audience any piece of writing is the intended or potential reader or readers. This should be *the most important* consideration in planning, writing, and reviewing a document. You "adapt" your writing to meet the needs, interests, and background of the readers who will be reading your writing.

The principle seems absurdly simple and obvious. It's much the same as telling someone, "Talk so the person in front of you can understand what you're saying." It's like saying, "Don't talk rocket science to your six-year-old." Do we need a course in that? Doesn't seem like it. But, in fact, lack of audience analysis and adaptation is one of the root causes of most of the problems you find in business documents.

Audiences, regardless of category, must also be analyzed in terms of characteristics such as the following:

- **Background—knowledge, experience, training:** One of your most important concerns is just how much knowledge, experience, or training you can expect in your readers. If you expect some of your readers to lack certain background, do you automatically supply it in your document? Consider an example: imagine you're writing a guide to using a software product that runs under Microsoft Windows. How much can you expect your readers to know about Windows? If some are likely to know little about Windows, should you provide that information? If you say no, then you run the risk of customers' getting frustrated with your product. If you say yes to adding background information on Windows, you increase your work effort and add to the page count of the document (and thus to the cost). Obviously, there's no easy answer to this question—part of the answer may involve just how small a segment of the audience needs that background information.
- **Needs and interests:** To plan your document, you need to know what your audience is going to expect from that document. Imagine how readers will want to use your document and what will they demand from it. For example, imagine you are writing a manual on how to use a new smart phone—what are your readers going to expect to find in it? Imagine you're under contract to write a background report on climate change for a national real estate association—what do they want to read about and, equally important, what do they *not* want to read about?

- **Different cultures:** If you write for an international audience, be aware that formats for indicating time and dates, monetary amounts, and numerical amounts vary across the globe. Also be aware that humour and figurative language (as in "hit a home run") are not likely to be understood outside of your own culture.
- **Other demographic characteristics:** There are many other characteristics about your readers that *might* have an influence on how you should design and write your document—for example, age groups, type of residence, area of residence, gender, political preferences, and so on.

Audience analysis can get complicated by other factors, such as mixed audience types for one document and wide variability within the audience.

- **More than one audience.** You may often find that your business message is for more than one audience. For example, it may be seen by technical people (experts and technicians) and administrative people (executives). What to do? You can either write all the sections so that all the audiences of your document can understand them (good luck!), or you can write each section strictly for the audience that would be interested in it, then use headings and section introductions to alert your audience about where to go and what to avoid in your report.
- **Wide variability in an audience.** You may realize that, although you have an audience that fits into only one category, there is a wide variability in its background. This is a tough one—if you write to the lowest common denominator of reader, you're likely to end up with a cumbersome, tedious book-like thing that will turn off the majority of readers. But if you don't write to that lowest level, you lose that segment of your readers. What to do? Most writers go for the majority of readers and sacrifice that minority that needs more help. Others put the supplemental information in appendices or insert cross-references to beginners' books.

Reference

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Attributions

3.4 Purpose

Preparation for the writing process involves purpose, research and investigation, reading and analyzing, and adaptation. In this chapter, we consider how to determine the purpose of a document and how that awareness guides the writer to effective product.

While you may be free to create documents that represent yourself or your organization, your employer will often have direct input into their purpose. All acts of communication have general and specific purposes, and the degree to which you can identify these purposes will influence how effective your writing is. General purposes involve the overall goal of the communication interaction, which have been mentioned previously: to inform, persuade, entertain, facilitate interaction, or motivate a reader. The general purpose influences the presentation and expectation for feedback. In an informative message—the most common type of writing in business—you will need to cover several predictable elements:

- Who
- What
- When
- Where
- How
- Why (optional)

Some elements may receive more attention than others, and they do not necessarily have to be addressed in the order you see here. Depending on the nature of your project, as a writer you will have a degree of input over how you organize them.

Note that the last item, *Why*, is designated as optional. This is because business writing sometimes needs to report facts and data objectively, without making any interpretation or pointing to any cause-effect relationship. In other business situations, of course, identifying why something happened or why a certain decision is advantageous will be the essence of the communication.

In addition to its general purpose (e.g., to inform, persuade, entertain, or motivate), every piece of writing also has at least one specific purpose, which is the intended outcome–the result that will happen once your written communication has been read.

For example, imagine that you are an employee in a small city's housing authority and have been asked to draft a letter to city residents about radon. Radon is a naturally occurring radioactive gas that has been classified by Health Canada as a health hazard. In the course of a routine test, radon was detected in minimal levels in an apartment building operated by the housing authority. It presents a relatively low level of risk, but because the incident was reported in the local newspaper, the mayor has asked the housing authority director to be proactive in informing all the city residents of the situation.

The general purpose of your letter is to inform, and the specific purpose is to have a written record of informing all city residents about how much radon was found, when, and where; where they can get more information on radon; and the date, time, and place of the meeting. Residents may read the information and attend or they may not even read the letter. But once the letter has been written, signed, and distributed, your general and specific purposes have been accomplished.

Now imagine that you begin to plan your letter by applying the above list of elements. Recall that the letter informs residents on three counts: (1) the radon finding, (2) where to get information about radon, and (3) the upcoming meeting. For each of these pieces of information, the elements may look like the following:

1. Radon Finding

- Who: The manager of the apartment building (give name)
- What: Discovered a radon concentration of 250 becquerels per cubic metre (Bq/m^3) and reported it to the housing authority director, who informed the city health inspector and mayor
- When: During the week of December 15
- Where: In the basement of the apartment building located at (give address)
- How: In the course of performing a routine annual test with a commercially available do-it-yourself radon test kit

2. Information about radon

- Who: According to the city health inspector and Health Canada
- What: Radon is a naturally occurring radioactive gas that results from the breakdown of uranium in soil; a radon test level above 200 Bq/m^3 may be cause for concern
- When: Radon levels fluctuate from time to time, so further testing will be done; in past years, test results were below 200 Bq/m^3
- Where: More information is available from Health Canada
- How: By phone, mail, or on the internet (provide full contact information for both sources)
- Why: To become better informed and avoid misunderstandings about radon, its health risks, and the meaning of radon test results

3. City meeting about radon

- Who: All city residents are welcome
- What: Attend an informational meeting where the mayor, director of the housing authority, city health inspector, and representative from Health Canada will speak and answer questions
- When: Monday, January 7, at 7 p.m.
- Where: City hall community room
- Why: To become better informed and avoid misunderstandings about radon, its health risks, and the meaning of radon test results

Once you have laid out these elements of your informative letter, you have an outline from which it will be easy to write the actual letter.

Your effort serves as a written record of correspondence informing them that radon was detected, which may be one of the specific or primary purposes. A secondary purpose may be to increase attendance at the town hall meeting, but you will need feedback from that event to determine the effectiveness of your effort.

Now imagine that instead of being a housing authority employee, you are a city resident who receives that informative letter, and you happen to operate a business as a certified radon mitigation contractor. You may decide to build on this information and develop a persuasive message. You may draft a letter to the homeowners and landlords in the neighborhood near the building in question. To make your message persuasive, you may focus on the perception that radiation is inherently dangerous and that no amount of radon has been declared safe. You may cite external authorities that indicate radon is a contributing factor to several health ailments, and even appeal to emotions with phrases like “protect your children” and “peace of mind.” Your letter will probably encourage readers to check with Health Canada to verify that you are a certified contractor, describe the services you provide, and indicate that friendly payment terms can be arranged.

Credibility, timing, and audience

At this point in the discussion, we need to visit the concept of credibility. Credibility, or the perception of integrity of the message based on an association with the source, is central to any communication act. If the audience perceives the letter as having presented the information in an impartial and objective way, perceives the health inspector's expertise in the field as relevant to the topic, and generally regards the housing authority in a positive light, they will be likely to accept your information as accurate. If, however, the audience does not associate trust and reliability with your message in particular and the city government in general, you may anticipate a lively discussion at the city hall meeting.

In the same way, if the reading audience perceives the radon mitigation contractor's letter as a poor sales pitch without their best interest or safety in mind, they may not respond positively to its message and be unlikely to contact him about any possible radon problems in their homes. If, however, the sales letter squarely addresses the needs of the audience and effectively persuades them, the contractor may look forward to a busy season.

Returning to the original housing authority scenario, did you consider how your letter might be received or the fear it may have generated in the audience? In real life you don't get a second chance, but in our academic setting, we can go back and take more time on our assignment, using the twelve-item checklist presented in chapter 2.3. Imagine that you are the mayor or the housing authority director. Before you assign an employee to send a letter to inform residents about the radon finding, take a moment to consider how realistic your purpose is. As a city official, you may want the letter to serve as a record that residents were informed of the radon finding, but will that be the only outcome? Will people be even more concerned in response to the letter than they were when the item was published in the newspaper? Would a persuasive letter serve the city's purposes better than an informative one?

Another consideration is the timing. On the one hand, it may be important to get the letter sent as quickly as possible, as the newspaper report may have already aroused concerns that the letter will help calm. On the other hand, given that the radon was discovered in mid-December, many people may be caught up in holiday celebrations and will not pay attention to the letter. In early January, everyone will be paying more attention to their mail as they anticipate the arrival of tax-related documents or even the dreaded credit card statement. If the mayor has scheduled the city hall meeting for January 7, people may be unhappy if they only learn about the meeting at the last minute. Also consider your staff; if many of them will be taking vacation during this period, there may not be enough staff in place to respond to phone calls that will likely come in response to the letter, even though the letter advises residents to contact Health Canada.

Next, how credible are the sources cited in the letter? If you as a housing authority employee have been asked to draft it, to whom should it go once you have it written? The city health inspector is mentioned as a source; will they read and approve the letter before it is sent? Is there someone at the region, provincial, or federal level who can, or should, check the information before it is sent?

The next item on the checklist is to make sure the message reflects positively on your business. In our hypothetical case, the "business" is city government. The letter should acknowledge that city officials and employees are servants of the taxpayers. "We are here to serve you" should be expressed, if not in so many words, in the tone of the letter.

The next three items on the checklist are associated with the audience profile: audience size, composition, knowledge, and awareness of the topic. Since your letter is being sent to all city residents, you likely have a database from which you can easily tell how many readers constitute your audience. What about audience composition? What else do you know about the city's residents? What percentage of households includes children? What is the education level of most of the residents? Are there many residents whose first language is not English; if so, should your letter be translated into any other languages? What is the range of income levels in the city? How well informed are city residents about radon? Has radon been an issue in any other buildings in the city in recent years? The answers to these questions will help determine how detailed the information in your letter should be.

Finally, anticipate probable responses. Although the letter is intended to inform, could it be misinterpreted as an attempt to "cover up" an unacceptable condition in city housing? If the local newspaper were to reprint the letter, would the mayor be upset? Is there someone in public relations who will be doing media interviews at the same time the letter goes out? Will the release of information be coordinated, and if so by whom?

One additional point that deserves mention is the notion of decision makers. Even if your overall goal is to inform or persuade, the basic mission is to simply communicate. Establishing a connection is a fundamental aspect of the communication audience, and if you can correctly target key decision makers you increase your odds for making the connection with those you intend to inform or persuade. Who will open the mail or email? Who will act upon it? The better you can answer those questions, the more precise you can be in your writing efforts.

Reference

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Attribution

3.5 Channels

Purpose is closely associated with channel. We need to consider the purpose when choosing a channel. From source to receiver, message to channel, feedback to context, environment, and interference, all eight components play a role in the dynamic process. While writing often focuses on an understanding of the receiver (as we've discussed) and defining the purpose of the message, the channel—or the "how" in the communication process—deserves special mention.

So far, we have discussed a simple and traditional channel of written communication: the hard-copy letter mailed in a standard business envelope and sent by postal mail. But in today's business environment, this channel is becoming increasingly rare as electronic channels become more widely available and accepted.

When is it appropriate to send an instant message or text message versus a conventional e-mail or fax? What is the difference between a letter and a memo? Between a report and a proposal? Writing itself is the communication medium, but each of these specific channels has its own strengths, weaknesses, and understood expectations that are summarized in Table 2.5.1.

Table 2.5.1 Written communication channels

Channel	Strengths	Weaknesses	Expectations	When to choose
Instant message or text message	Very fastGood for rapid exchanges of small amounts of information Inexpensive	InformalNot suitable for large amounts of information Abbreviations lead to misunderstandings	Quick response	Informal use among peers at similar levels within an organizationYou need a fast, inexpensive connection with a colleague over a small issue and limited amount of information
Channel	**Strengths**	**Weaknesses**	**Expectations**	**When to choose**
Email	FastGood for relatively fast exchanges of information "Subject" line allows compilation of many messages on one subject or project Easy to distribute to multiple recipients Inexpensive	May hit "send" prematurelyMay be overlooked or deleted without being read "Reply to all" error "Forward" error Large attachments may cause the e-mail to be caught in recipient's spam filter	Normally a response is expected within 24 hours, although norms vary by situation and organizational culture	You need to communicate but time is not the most important considerationYou need to send attachments (provided their file size is not too big)
Channel	**Strengths**	**Weaknesses**	**Expectations**	**When to choose**
Fax	FastProvides documentation	Receiving issues (e.g., the receiving machine may be out of paper or toner)Long distance telephone charges apply Transitional telephone-based technology losing popularity to online information exchange	Normally, a long (multiple page) fax is not expected	You want to send a document whose format must remain intact as presented, such as a medical prescription or a signed work orderAllows use of letterhead to represent your company
Channel	**Strengths**	**Weaknesses**	**Expectations**	**When to choose**
Memo	Official but less formal than a letterClearly shows who sent it, when, and to whom	Memos sent through e-mails can get deleted without reviewAttachments can get removed by spam filters	Normally used internally in an organization to communicate directives from management on policy and procedure, or documentation	You need to communicate a general message within your organization
Channel	**Strengths**	**Weaknesses**	**Expectations**	**When to choose**
Letter	FormalLetterhead represents your company and adds credibility	May get filed or thrown away unreadCost and time involved in printing, stuffing, sealing, affixing postage, and travel through the postal system	Specific formats associated with specific purposes	You need to inform, persuade, deliver bad news or negative message, and document the communication
Channel	**Strengths**	**Weaknesses**	**Expectations**	**When to choose**
Report	Can require significant time for preparation and production	Requires extensive research and documentation	Specific formats for specific purposes	You need to document the relationship(s) between large amounts of data to inform an internal or external audience
Channel	**Strengths**	**Weaknesses**	**Expectations**	**When to choose**
Proposal	Can require significant time for preparation and production	Requires extensive research and documentation	Specific formats for specific purposes	You need to persuade an audience with complex arguments and data

By choosing the correct channel for a message, you can save yourself many headaches and increase the likelihood that your writing will be read, understood, and acted upon in the manner you intended.

In terms of writing preparation, you should review any electronic communication before you send it. Spelling and grammatical errors will negatively impact your credibility. With written documents, we often take time and care to get it right the first time, but the speed of instant messaging, text messaging, or emailing often deletes this important review cycle of written works. Just because the document you prepare in a text message is only one sentence long doesn't mean it can't be misunderstood or expose you to liability. Take time when preparing your written messages, regardless of their intended presentation, and review your work before you click "send."

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3.6 Audience types

Identifying your primary, secondary, and hidden audiences

Your audience is the person or people you want to communicate with. By knowing more about them (their wants, needs, values, etc.), you are able to better craft your message so that they will receive it the way you intended.

Your success as a communicator partly depends on how well you can tailor your message to your audience.

Your **primary audience** is your intended audience; it is the person or people you have in mind when you decide to communicate something. However, when analyzing your audience you must also beware of your **secondary audience**. These are other people you could reasonably expect to come in contact with your message. For example, you might send an email to a customer, who, in this case, is your primary audience, and copy (cc:) your boss, who would be your secondary audience. Beyond these two audiences, you also have to consider your **hidden audience**, which are people who you may not have intended to come in contact with your audience (or message) at all, such as a colleague who gets a forwarded copy of your email.

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3.7 Audience demographics

There are social and economic characteristics that can influence how someone behaves as an individual. Standard demographic variables include a person's age, gender, family status, education, occupation, income, and ethnicity. Each of these variables or characteristics can provide clues about how a person might respond to a message.

For example, people of different ages consume (use) media and social media differently. According to the Pew Research Center (2018), 81% of people aged 18-29 use Facebook, 64% use Instagram, and 40% use Twitter. In contrast, 65% of people aged 50-64 use Facebook, 21% use Instagram, and 19% use Twitter (Pew Research Center, 2018). If I were trying to market my product to those aged 50-64, I would likely reach a larger audience (and potentially make more sales) if I used targeted ads on Facebook rather than recruiting brand ambassadors on Instagram. Knowing the age (or ages) of your audience(s) can help inform what channels you use to send your message. It can also help you determine the best way to structure and tailor your message to meet specific audience characteristics.

Reference

Pew Research Center. (2018). *Social media fact sheet*. Retrieved from http://www.pewinternet.org/fact-sheet/social-media/.

Attribution

3.8 Audience geographics

We all understand geographically defined political jurisdictions such as cities, provinces, and territories. You can also geographically segment audiences into rural, urban, suburban, and edge communities (the office parks that have sprung up on the outskirts of many urban communities). These geographic categories help define rifts between regions on issues such as transportation, education, taxes, housing, land use, and more. These are important geographic audience categories for politicians, marketers, and businesses. For example, local retail advertisers want to reach audiences who are in the reading or listening range of the local newspaper or radio station and within traveling distance of their stores. Therefore, it's important to consider the geographic characteristics of your audience when crafting business messages.

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3.9 Audience psychographics

Psychographics refer to all the psychological variables that combine to form a person's inner self. Even if two people share the same demographic or geographic characteristics, they may still hold entirely different ideas and values that define them personally and socially. Some of these differences are explained by looking at the psychographic characteristics that define them. Psychographic variables include:

Motives – an internal force that stimulates someone to behave in a particular manner. A person has media consumption motives and buying motives. A motive for watching television may be to escape; a motive for choosing to watch a situation comedy rather than a police drama may be the audience member's need to laugh rather than feel suspense and anxiety.

Attitudes – a learned predisposition, a feeling held toward an object, person, or idea that leads to a particular behaviour. Attitudes are enduring; they are positive or negative, affecting likes and dislikes. A strong positive attitude can make someone very loyal to a brand (one person is committed to the Mazda brand so they will only consider Mazda models when it is time to buy a new car). A strong negative attitude can turn an audience member away from a message or product (someone disagrees with the political slant of Fox News and decides to watch MSNBC instead).

Personalities – a collection of traits that make a person distinctive. Personalities influence how people look at the world, how they perceive and interpret what is happening around them, how they respond intellectually and emotionally, and how they form opinions and attitudes.

Lifestyles – these factors form the mainstay of psychographic research. Lifestyle research studies the way people allocate time, energy and money.

Attributions

3.10 Adapting messages

Let's say you've analyzed your audience until you know them better than you know yourself. What good is it? How do you use this information? How do you keep from writing something that will still be incomprehensible or useless to your readers?

The business of writing *to* your audience may have a lot to do with in-born talent, intuition, and even mystery. But there are some controls you can use to have a better chance to connect with your readers. The following "controls" mostly have to do with making information more understandable for your specific audience:

- Add information readers need to understand your document. Check to see whether certain key information is missing—for example, a critical series of steps from a set of instructions, important background that helps beginners understand the main discussion, or definitions of key terms.
- Omit information your readers do not need. Unnecessary information can also confuse and frustrate readers—after all, it's there so they feel obligated to read it. For example, you can probably chop theoretical discussion from basic instructions.
- Change the level of the information you currently have. You may have the right information but it may be "pitched" at too high or too low a technical level. It may be pitched at the wrong kind of audience—for example, at an expert audience rather than a technician audience. This happens most often when product-design notes are passed off as instructions.
- Add examples to help readers understand. Examples are one of the most powerful ways to connect with audiences, particularly in instructions. Even in non-instructional text, for example, when you are trying to explain a technical concept, examples are a major help—analogies in particular.
- Change the level of your examples. You may be using examples, but the technical content or level may not be appropriate to your readers.
- Change the organization of your information. Sometimes, you can have all the right information but arrange it in the wrong way. For example, there can be too much background information up front (or too little) such that certain readers get lost. Sometimes, background information needs to be consolidated into the main information—for example, in instructions it's sometimes better to feed in chunks of background at the points where they are immediately needed.
- Strengthen transitions. It may be difficult for readers, particularly non-specialists, to see the connections between the main sections of your report, between individual paragraphs, and sometimes even between individual sentences. You can make these connections much clearer by adding *transition words* and by echoing *key words* more accurately. Words like "therefore," "for example," "however" are transition words—they indicate the logic connecting the previous thought to the upcoming thought.
- Write stronger introductions—both for the whole document and for major sections. People seem to read with more confidence and understanding when they have the "big picture"—a view of what's coming, and how it relates to what they've just read. Therefore, make sure you have a strong introduction to the entire document—one that makes clear the topic, purpose, audience, and contents of that document. And for each major section within your document, use mini-introductions that indicate at least the topic of the section and give an overview of the subtopics to be covered in that section.
- Create topic sentences for paragraphs and paragraph groups. It can help readers immensely to give them an idea of the topic and purpose of a section (a group of paragraphs) and in particular to give them an overview of the subtopics about to be covered.
- Change sentence style and length. How you write—down at the individual sentence level—can make a big difference too. In instructions, for example, using imperative voice and "you" phrasing is vastly more understandable than the passive voice or third-personal phrasing. Passive, person-less writing is harder to

read—put people and action in your writing. Similarly, go for active verbs as opposed to *be* verb phrasing. All of this makes your writing more direct and immediate—readers don't have to dig for it. Sentence length matters as well. An average of somewhere between 15 and 25 words per sentence is about right; sentences over 30 words are often mistrusted.

- Work on sentence clarity and economy. This is closely related to the previous "control" but deserves its own spot. Often, writing style can be so wordy that it is hard or frustrating to read. When you revise your rough drafts, put them on a diet—go through a draft line by line trying to reduce the overall word, page or line count by 20 percent. Try it as an experiment and see how you do. You'll find a lot of fussy, unnecessary detail and inflated phrasing you can chop out.
- Use more or different graphics. For non-specialist audiences, you may want to use more graphics—and simpler ones at that. Graphics for specialists are more detailed and more technical.
- Break text up or consolidate text into meaningful, usable chunks. For non-specialist readers, you may need to have shorter paragraphs.
- Add cross-references to important information. In technical information, you can help non-specialist readers by pointing them to background sources. If you can't fully explain a topic on the spot, point to a section or chapter where it is.
- Use headings and lists. Readers can be intimidated by big dense paragraphs of writing, uncut by anything other than a blank line now and then. Search your rough drafts for ways to incorporate headings—look for changes in topic or subtopic. Search your writing for listings of things—these can be made into vertical lists. Look for paired listings such as terms and their definitions—these can be made into two-column lists. Of course, be careful not to force this special formatting—don't overdo it.
- Use special typography, and work with margins, line length, line spacing, type size, and type style. You can do things like making the lines shorter (bringing in the margins), using larger type sizes, and other such tactics. Certain type styles are believed to be friendlier and more readable than others.

These are the kinds of "controls" that you can use to fine-tune your messages and make them as readily understandable as possible. In contrast, it's the accumulation of lots of problems in these areas—even seemingly trivial ones—that add up to a document being difficult to read and understand.

Attribution

PART 4: WRITING

4.1 Style and tone

Style and tone are often considered interchangeable and there are some blurry distinctions between the two. But for our purposes, style refers to elements such as active versus passive writing, varied sentence lengths, flow, variety of word use, and punctuation choices. Style gives your writing a type of personality when coupled together with tone. As with the audience and format, it's important that the style you choose matches with the intended purpose of your message.

Similar in some ways to style, tone refers to the feeling your audience will get when they decode your document. Here you would ask yourself if your tone is formal, informal, positive, negative, polite, direct, or indirect. The purpose of asking yourself this question is to determine whether the tone suits or otherwise enhances the purpose of your intended message.

Let's begin by considering and thinking about the following scenarios.

Scenarios for reflection

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

- *"Maybe if the project leader had set a reasonable schedule from the beginning, we wouldn't be in this mess now."*
- *"Whatever they're paying you, it isn't enough. Thanks for working so hard on this."*
- *"I'm not sure what else is on your plate right now, but I need these numbers by this afternoon—actually in the next two hours."*
- *"I cant remember when u said this was due."*
- *"While I appreciate that your team is being pulled in a number of different directions right now, this project is my department's main priority for the semester. What can we do from our end to set your group up to complete this by June?*

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

As with any piece of writing, considering audience, purpose, and type of information is key to constructing business communication. Truly finessing your writing so that it works *for* you, rather than against you, is key to forming strong professional relationships and being effective in your own position.

Developing an appropriate business writing style will reflect well on you and increase your success in any career. Misspellings of individual words or grammatical errors involving misplacement or incorrect word choices in a sentence can create confusion, lose meaning, and have a negative impact on the reception of your message. Which style you use will depend on your audience, context, channel, and the purpose of the message (among other reasons).

Informal

Informal style is a casual style of writing. It differs from standard business English in that it often makes use of colourful expressions, slang, and regional phrases. As a result, it can be difficult to understand for an English learner or a person from a different region of the country. Sometimes colloquialism takes the form of a word difference; for example, the difference between a "Coke," a "tonic," a "pop," and a "soda pop" primarily depends on where you live.

This type of writing uses colloquial language, such as the style of writing that is often used in texting:

> ok fwiw i did my part n put it in where you asked but my ? is if the group does not participate do i still get credit for my part of what i did n also how much do we all have to do i mean i put in my opinion of the items in order do i also have to reply to the other team members or what? Thxs

While we may be able to grasp the meaning of the message and understand some of the abbreviations, this informal style is generally not appropriate in business communications. That said, colloquial writing may be permissible, and even preferable, in some limited business contexts. For example, a marketing letter describing a folksy product such as a wood stove or an old-fashioned popcorn popper might use a colloquial style to create a feeling of relaxing at home with loved ones. Still, it is important to consider how colloquial language will appear to the audience. Will the meaning of your chosen words be clear to a reader who is from a different part of the country? Will a folksy tone sound like you are "talking down" to your audience, assuming that they are not intelligent or educated enough to appreciate standard English? A final point to remember is that colloquial style is not an excuse for using expressions that are sexist, racist, profane, or otherwise offensive.

Formal

In business writing, often the appropriate style will have a degree of formality. Writers using a formal style tend to use a more sophisticated vocabulary—a greater variety of words, and more words with multiple syllables—not for the purpose of throwing big words around, but to enhance the formal mood of the document. They also tend to use more complex syntax, resulting in sentences that are longer and contain more subordinate clauses. That said, it's still critically important to ensure the words you use are precise, relevant, and convey the appropriate and accurate meaning! This writing style may use the third person and may also avoid using contractions. However, this isn't always the case.

Positive language

Unless there is a specific reason not to, use positive language wherever you can. Positive language benefits your writing in two ways. First, it creates a positive tone, and your writing is more likely to be well-received. Second, it clarifies your meaning, as positive statements are more concise. Take a look at the following negatively worded sentences and then their positive counterparts, below.

Examples:
Negative: Your car will not be ready for collection until Friday.
Positive: Your car will be ready for collection on Friday.
Negative: You did not complete the exam.
Positive: You will need to complete the exam.
Negative: Your holiday time is not approved until your manager clears it.
Positive: Your holiday time will be approved when your manager clears it.

Avoid using multiple negatives in one sentence, as this will make your sentence difficult to understand. When readers encounter more than one negative construct in a sentence, their brains have to do more cognitive work to decipher the meaning; multiple negatives can create convoluted sentences that bog the reader down.

Examples:
Negative: A decision *will not* be made *unless* all board members agree.
Positive: A decision will be made when all board members agree.
Negative: The event *cannot* be scheduled *without* a venue.
Positive: The event can be scheduled when a venue has been booked.

So what is professional writing anyways?

If you answered "it depends," you are correct.

Audiences have expectations and needs and your job is to meet them. Some business audiences prefer a fairly formal tone. If you include contractions or use a style that is too casual, you may lose their interest and attention; you may also give them a negative impression of your level of expertise. However, if you are writing for an audience that expects informal language, you may lose their interest and attention by writing too formally; your writing may also come across as arrogant or pompous. It is not that one style is better than the other, but simply that styles of writing vary across a range of options. The skilled business writer will know their audience and will adapt the message to best facilitate communication. Choosing the right style can make a significant impact on how your writing is received.

If you use expressions that imply a relationship or a special awareness of information such as "you know," or "as we discussed," without explaining the necessary background, your writing may be seen as overly familiar, intimate, or even secretive. Trust is the foundation for all communication interactions and a careless word or phrase can impair trust.

If you want to use humour, think carefully about how your audience will interpret it. Humour is a fragile form of communication that requires an awareness of irony, of juxtaposition, or a shared sense of attitudes, beliefs, and values. Different people find humour in different situations, and what is funny to one person may be dull, or even hurtful, to someone else.

In the next chapter, we'll discuss plain language, including how and why to do so.

Attributions

4.2 Plain language

While there was a time when many business documents were written in the third person to give them the impression of objectivity, this formal style was often passive and wordy. Today, it has given way to active, clear, concise writing, sometimes known as "plain English" (Bailey, 2008). Plain language style involves everyday words and expressions in a familiar group context and may include contractions. Why use a $100 word when a 25 cent one will do?

Let's consider some statements. What do you think makes one sentence easier to understand than the other?

Statements for reflection

Which statement is easier to understand? What elements make it easier to understand?

A. When communicating to an audience in-person, it is important to project your voice into the back corners of the room.

B. Speak loudly when presenting so the people in the back row can hear you.

Which statement is easier to understand?

A. No one is permitted to use the park during the hours of 10 p.m. – 6 a.m.

B. The park is closed from 10 p.m. – 6 a.m.

Which statement is easier to understand?

A. The photocopier is out of service until further notice.

B. The photocopier is broken.

As business and industry increasingly trade across borders and languages, writing techniques that obscure meaning or impede understanding can cause serious problems. Efficient writing styles have become the norm.

No matter who your audience is, they will appreciate your ability to write using plain language. Here are some principles for writing in plain language:

Principle 1: Use active voice

To communicate professionally, you need to know when and how to use either active or passive voice. Although most contexts prefer the active voice, the passive voice may be the best choice in certain situations. Generally, though, passive voice tends to be awkward, vague, wordy, and a grammatical construct you should avoid in most cases.

Recognizing the active and passive voice

To use active voice, make the noun that performs the action the subject of the sentence and pair it directly with an action verb.

Read these two sentences:

Matt Damon left Harvard in the late 1980s to start his acting career.

Matt Damon's acting career was started in the late 1980s when he left Harvard.

In the first sentence, left is an action verb that is paired with the subject, Matt Damon. If you ask yourself, "Who or what left?" the answer is Matt Damon. Neither of the other two nouns in the sentence—Harvard and career—"left" anything.

Now look at the second sentence. The action verb is started. If you ask yourself, "Who or what started something?" the answer, again, is Matt Damon. But in this sentence, the writer placed career—not Matt Damon—in the subject position. When the doer of the action is not the subject, the sentence is in passive voice. In passive voice constructions, the doer of the action usually follows the word by as the indirect object of a prepositional phrase, and the action verb is typically partnered with a version of the verb to be.

Writing in the active voice

Writing in active voice is easy once you understand the difference between active and passive voice. Make sure you always define who or what did what.

Using the passive voice

While using the active voice is preferred, sometimes passive voice is the best option. Consider the following acceptable uses of passive voice.

- When you do not know who or what is responsible for the action:

> **Example:** Our front-door lock was picked.
>
> **Rationale:** If you do not know who picked the lock on your front door, you cannot say who did it. You could say a thief broke in, but that would be an assumption; you could, theoretically, find out that the lock was picked by a family member who had forgotten to take a key.

- When you want to hide the person or thing responsible for the action, such as in a story:

> **Example:** The basement was filled with a mysterious scraping sound.

Rationale: If you are writing a dramatic story, you might introduce a phenomenon without revealing the person or thing that caused it.

- When the person or thing that performed the action is not important:

Example: The park was flooded all week.

Rationale: Although you would obviously know that the rainwater flooded the park, saying so would not be important.

- When you do not want to place credit, responsibility, or blame:

Example: A mistake was made in the investigation that resulted in the wrong person being on trial.

Rationale: Even if you think you know who is responsible for a problem, you might not want to expose the person.

- When you want to maintain the impression of objectivity:

Example: It was noted that only first-graders chose to eat the fruit.

Rationale: Research reports in certain academic disciplines attempt to remove the researcher from the results, to avoid saying, for example, "I noted that only first graders...."

- When you want to avoid using a gendered construction, and pluralizing is not an option:

Example: If the password is forgotten by the user, a security question will be asked.

Rationale: This construction avoids the need for the cumbersome "his or her" (as in "the user forgets his or her password").

Principle 2: Use common words instead of complex words

Inappropriate word choices will get in the way of your message. For this reason, use language that is accurate and appropriate for the writing situation. Omit jargon (technical words and phrases common to a specific profession or discipline) and slang (invented words and phrases specific to a certain group of people), unless your audience and purpose call for such language. Avoid using outdated words and phrases, such as "Dial the number." Be straightforward in your writing rather than using euphemisms (gentler, but sometimes inaccurate, ways of saying something). Be clear about the level of formality each piece of writing needs, and adhere to that level.

Writing without jargon or slang

Jargon and slang both have their places. Using jargon is fine as long as you can safely assume your readers also know the jargon. For example, if you are a lawyer writing to others in the legal profession, using legal jargon is perfectly fine. On the other hand, if you are writing for people outside the legal profession, using legal jargon would most likely be confusing, and you should avoid it. Of course, lawyers must use legal jargon in papers they prepare for customers. However, those papers are designed to navigate within the legal system and may not be clear to readers outside of this demographic.

Principle 3: Write for your reader

When you write for your readers and speak to an audience, you have to consider who they are and what they need to know. When readers know that you are concerned with their needs, they are more likely to be receptive to your message, and will be more likely to take the action you are asking them to and focus on important details.

Your message will mean more to your reader if they get the impression that it was written directly to them.

Organize your document to meet your readers' needs

When you write, ask yourself, "Why would someone read this message?" Often, it is because the reader needs a question answered. What do they need to know to prepare for the upcoming meeting, for example, or what new company policies do they need to abide by? Think about the questions your readers will ask and then organize your document to answer them.

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4.3 Inclusive language

Good communicators include everyone and don't make assumptions about their readers. You can make your language more inclusive by:

- Using the singular "they" instead of "he or she." For example, instead of saying, "A communicator should understand his or her audience," you could say, "A communicator should understand their audience" or "Communicators should understand their audience."
- Being specific when discussing a person's identity and use the terminology they prefer. For example, instead of saying "Marilyn Gabriel is a First Nations person," you could say "Marilyn Gabriel is a member of the Kwantlen Nation." Usually, a person's disability isn't relevant, but if it is, use neutral and specific language. For example, instead of saying "Brent is confined to a wheelchair" (which is both inaccurate, negative, and vague), you could say "Brent uses a wheelchair" or "Brent has cerebral palsy and uses a wheelchair." When in doubt, ask the person what terminology they prefer.
- Question the assumptions that you make about your audience. Consider that many of your readers might not share the same cultural values or experiences. For example, a sentence like "Every child waits all year for Christmas morning," consider that many of your readers might not have shared this experience.

You should be especially careful when writing about groups of people in a way that might reinforce stereotypes. For example, in his book *Elements of Indigenous Style*, Gregory Younging discusses how subtle bias can have a big impact when non-Indigenous people write about First Nations, Metis, and Inuit people. For example, instead of portraying Indigenous people as victims, focus on their "resilience, agency, and future" (2018, pg. 77). Instead of portraying an Indigenous culture as something static that existed in the past, focus on how that culture is thriving and changing.

Reference

Younging, G. (2018). *Elements of Indigenous style: A guide for writing by and about Indigenous Peoples.* Edmonton, AB: Brush Education.

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4.4 Concision

Keeping words and sentences short (conciseness) can help your audience understand your message in the way you intended. What does it mean to be concise?

Questions for reflection

- How do you feel when you read a short message? Does it feel rude? Is it easy to understand?
- Do you typically write long messages or short messages?
- Do you think your writing is wordy?
- Do you feel confident in recognizing what elements of writing may make it wordy?
- What strategies do you use to make your writing more concise?

It is easy to let your sentences become cluttered with words that do not add value to your message. Improve cluttered sentences by eliminating repetitive ideas, removing repeated words, and editing to eliminate unnecessary words.

Eliminating repetitive ideas

Unless you are providing definitions on purpose, stating one idea twice in a single sentence is redundant.

Removing repeated words

As a general rule, you should try not to repeat a word within a sentence. Sometimes you simply need to choose a different word, but often you can actually remove repeated words.

Example:
Original: The student who won the cooking contest is a very talented and ambitious student.
Revision: The student who won the cooking contest is very talented and ambitious.

Rewording to eliminate unnecessary words

If a sentence has words that are not necessary to carry the meaning, those words are unneeded and can be removed.

Examples:
Original: Andy has the ability to make the most fabulous twice-baked potatoes.
Revision: Andy makes the most fabulous twice-baked potatoes.
Original: For his part in the cooking class group project, Malik was responsible for making the mustard reduction sauce.
Revision: Malik made the mustard reduction sauce for his cooking class group project.

Avoid expletive pronouns (most of the time)

Many people create needlessly wordy sentences using expletive pronouns, which often take the form of "There is …" or "There are …."

Pronouns (e.g., I, you, he, she, they, this, that, who, etc.) are words that we use to replace nouns (i.e., people, places, things), and there are many types of pronouns (e.g., personal, relative, demonstrative, etc.). However, expletive pronouns are different from other pronouns because unlike most pronouns, they do not stand for a person, thing, or place; they are called expletives because they have no "value." Sometimes you will see expletive pronouns at the beginning of a sentence, sometimes at the end.

Examples:
There are a lot of reading assignments in this class.
I can't believe how many reading assignments *there are*!
Note: These two examples are *not* necessarily bad examples of using expletive pronouns. They are included to help you first understand what expletive pronouns are so you can recognize them.

The main reason you should generally avoid writing with expletive pronouns is that they often cause us to use more words in the rest of the sentence than we have to. Also, the empty words at the beginning tend to shift the more important subject matter toward the end of the sentence. The above sentences are not that bad, but at least they are simple enough to help you understand what expletive pronouns are. Here are some more examples of expletive pronouns, along with better alternatives.

Examples
Original: There are some people who love to cause trouble.
Revision: Some people love to cause trouble.
Original: There are some things that are just not worth waiting for.
Revision: Some things are just not worth waiting for.
Original: There is a person I know who can help you fix your computer.
Revision: I know a person who can help you fix your computer.

While not all instances of expletive pronouns are bad, writing sentences with expletives seems to be habit forming. It can lead to trouble when you are explaining more complex ideas, because you end up having to use additional strings of phrases to explain what you want your reader to understand. Wordy sentences, such as those with expletive pronouns, can tax the reader's mind.

Example
Original: *There is* a button you need to press *that* is red and says STOP.
Revision: You need to press the red STOP button. *Or:* Press the red STOP button.

When you find yourself using expletives, always ask yourself if omitting and rewriting would give your reader a clearer, more direct, less wordy sentence. Can I communicate the same message using fewer words without taking away from the meaning I want to convey or the tone I want to create?

Choose specific wording

You will give clearer information if you write with specific rather than general words. Evoke senses of taste, smell, hearing, sight, and touch with your word choices. For example, you could say, “My shoe feels odd.” But this statement does not give a sense of why your shoe feels odd, since “odd” is an abstract word that does not suggest any physical characteristics. Or you could say, “My shoe feels wet.” This statement gives you a sense of how your shoe feels to the touch. It also gives a sense of how your shoe might look as well as how it might smell, painting a picture for your readers. See the table below to compare general and specific words.

Reference

Bailey, E. P. (2008). *Plain English at work: A guide to business writing and speaking*. New York, NY: McGraw-Hill.

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4.5 You attitude (you view)

Considering the rhetorical aspects of any writing situation, such as purpose, stance, and audience, is an essential part of adapting the style of a message for any audience. Adopting a you-centered business style can help you achieve your purpose, choose a stance, and analyze your audience. A you-centered business style employs the you view and an audience-centered tone to choose particular words and adopt a targeted tone in a message.

The "you view" analyzes and emphasizes the reader's interests and perspectives. Because the reader's interest or benefit is stressed, the writer is more likely to help the reader understand information or act on a request. Adopting a you view often, but not always, involves using the words *you* or *your* rather than we, our, I, and mine. Consider the following sentence that focuses on the needs of the writer and the organization (we) rather than on those of the reader.

- We have not received your signed invoice, so we cannot process your payment.

Even though the sentence uses the word "your" twice, the first clause suggests that the point of view focuses on the writer's need to receive the invoice to process the payment. The word "we" itself is not problematic, but the we view is. Consider the following revisions, written with the you view.

- *We understand the importance of processing your payment* and will process it as soon as we receive your signed invoice.
- *So you can receive your payment promptly*, please send your signed invoice.

The needs and benefits of the reader are stressed in both of these examples. The first example focuses on the needs of the audience by associating the payment with "importance." The second revision emphasizes the benefits to the reader by including the second-person pronouns "you" early in the sentence.

Both revisions also use an audience-centered tone, so the writer is more likely to motivate the reader to act. An audience-centered tone foregrounds the reader's needs, preferences, and benefits. Incorporating an audience-centered tone into your writing means that you consider the words you choose *and* the ways in which you assemble those words in a sentence.

Workplace Case Studies

Case Study 1: Delivering Negative News

Let's consider a few examples based on specific workplace situations. Imagine that you are a Human Resources Manager who must inform employees that paychecks will be delivered a day late. Employees with direct deposit agreements will not be affected. A writer who does not analyze the rhetorical situation before carefully considering style might hastily write, "Due to an error made by our payroll company, all employees who never signed up for direct deposit will receive their paychecks late."

The writer's purpose in this writing situation is to tactfully deliver negative news. The writer's stance should be professional and empathetic, especially since the writer's audience will probably be disappointed, irritated, or frustrated by the message. Consider the following revision, written with the you view and an audience-centered tone.

- We apologize for the inconvenience caused by the fact that an issue at PLT processing will delay the next paycheck date by one day. By signing up for direct deposit, you can ensure that your pay will never be delayed.

The writer achieves their purpose by including a buffer with an audience-centered tone (*We apologize for the inconvenience*) before the bad news (*an issue at PLT processing will delay the next paycheck date by one day*). The writer also includes the reason for the negative news (*an issue at the payroll company, PLT processing*). The writer uses the second-person possessive pronoun “your” in the second sentence to promote the you view. The writer also maintains a problem-solving and empathetic, audience-centered tone by waiting until the second sentence to remind the audience that they can sign up for direct deposit.

Case Study 2: Promoting Safety in User Manuals

Another writing context might require a writer to compose a user manual for a ceiling fan. User manuals provide instructions for the setup, operation, and maintenance of a product. Most user manuals also include safety precautions and troubleshooting guides and charts. A writer who does not analyze the rhetorical situation before writing a section about mounting a ceiling fan might write a sentence like, “Be sure to read the following important information about where Super Air Flow fans might best be installed before mounting the fan.”

However, the writer’s purpose is to inform the reader about how to choose locations that will not cause safety issues or damage either furniture or the structure of a room. The writer’s stance should be informative and helpful, especially since the audience will probably appreciate learning about how and where to safely mount their fan. Consider the following revision, written from the you view and with an audience-centered tone.

- Before mounting your new Super Air Flow fan, read the following helpful recommendations.

This revision incorporates the you view by referring to the user as the owner of the fan (many user manuals are called owner manuals). The revision also adopts a you-centered tone by subordinating the dependent clause that refers to the fan to the independent clause that offers the reader “helpful recommendations.” These revisions will help the writer achieve their purpose—promoting safety.

Principles and Guidelines for Practice

1. Consider your purpose from the you view.
2. Analyze the audience and their potential reactions.
3. Adapt your message to the receiver’s needs by putting yourself in that person’s shoes (adopt the you view) and emphasizing the reader’s benefits (adopt a you-centered tone).

Note: Although emphasizing second-person pronouns (you/your) instead of first-person pronouns (I/we, us, our) can help you cultivate a you-centered business style, a you-centered style should include both a you view and an audience-centered tone that emphasize the reader’s needs and interests.

I/we View	You View and Audience-Centered Tone
	Please share your valuable thoughts about parking on the attached survey; your opinions matter. Because your ideas count, give us your thoughts on the attached survey about parking.
I need to know what type of model you have before I can do anything.	Would it be possible for you to tell me what type of model you have so that I can help you solve this problem? I can help you solve this problem. Would it be possible for you to tell me what type of model you own?
All employees must immediately fill out the enclosed questionnaire so that we can allocate our continuing education funds to employees.	You can be one of the first employees to sign up for our continuing education funds by immediately filling out the enclosed questionnaire. By immediately filling out the enclosed questionnaire, you can be one of the first employees to receive continuing education funds.

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PART 5: MESSAGE TYPES

5.1 Memos

A memo (or memorandum, meaning "reminder") is normally used for communicating policies, procedures, or related official business within an organization. It is often written from a one-to-all perspective (like mass communication), broadcasting a message to an audience, rather than a one-on-one, interpersonal communication. It may also be used to update a team on activities for a given project or to inform a specific group within a company of an event, action, or observance.

Memo purpose

A memo's purpose is often to inform and represent the business or organization's interests, but it occasionally includes an element of persuasion or a call to action. All organizations have informal and formal communication networks. The unofficial, informal communication network within an organization is often called the grapevine, and it is often characterized by rumour, gossip, and innuendo. On the grapevine, one person may hear that someone else is going to be laid off and start passing the news around. Rumours change and transform as they are passed from person to person, and before you know it, the word is that they are shutting down your entire department.

One effective way to address informal, unofficial speculation is to spell out clearly for all employees what is going on with a particular issue. If budget cuts are a concern, then it may be wise to send a memo explaining the changes that are imminent. If a company wants employees to take action, they may also issue a memorandum.

Memo format

A memo has a header with guide words that clearly indicate who sent the memo, who the intended recipients are, the date of the memo, and a descriptive subject line. The content of each guide word field aligns. The message then follows the header, and it typically includes a declaration (introduction), a discussion, and a summary.

Figure 4.1.1 shows a sample memo.

To: All employees
From: Larry Ogawa, IT Manager, The Widget Research Company
Date: June 15, 2018
Subject: New photocopier installations – July 5

On July 5, new photocopiers will be installed in the photocopier room on each floor. The installation will take place from 8:30 – 11:30 a.m. During this time, printing, scanning, and photocopying will not be available.

The old photocopiers will be disconnected from the network on the morning of July 5. Technicians will be on-site to simultaneously install the new machines on every floor in order to minimize printing downtime.

The new photocopiers have all of the same functionality as the ones they are replacing but will be faster and quieter. Training sessions will be organized so all employees can learn how to use the new machines. More details about these training sessions will be shared by the end of this month.

Please direct any questions or concerns to me.

Figure 4.1.1. A sample memo (Melissa Ashman, 2018, CC-BY-NC 4.0 international license)

Five tips for effective business memos

1. Audience orientation

Always consider the audience and their needs when preparing a memo (or any message for that matter). An acronym or abbreviation that is known to management may not be known by all the employees of the organization, and if the memo is to be posted and distributed within the organization, the goal is to be clear and concise communication at all levels with no ambiguity.

2. Professional tone

Memos are often announcements, and the person sending the memo speaks for a part or all of the organization. Use a professional tone at all times.

3. Subject emphasis

The topic of the memo is normally declared in the subject line, and it should be clear, concise, and descriptive. If the memo is announcing the observance of a holiday, for example, the specific holiday should be named in the subject line—for example, use “Thanksgiving weekend schedule” rather than “holiday observance.”

4. Direct format

Some written business communication allows for a choice between direct and indirect formats, but memorandums are almost always direct. The purpose is clearly announced immediately and up-front, and the explanation or supporting information then follows.

5. Maintain objectivity

Memos should have an objective tone without personal bias, preference, or interest on display. Avoid subjectivity.

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5.2 Letters

Letters are brief messages sent to recipients that are often outside the organization (Bovee & Thill, 2010). They are often printed on letterhead paper and represent the business or organization in one or two pages. Shorter messages may include e-mails or memos, either hard copy or electronic, while reports tend to be three or more pages in length.

While e-mail and text messages may be used more frequently today, the business letter remains a common form of written communication. It can serve to introduce you to a potential employer, announce a product or service, or even serve to communicate feelings and emotions. We'll examine the basic outline of a letter and then focus on specific products or writing assignments.

All business messages have expectations in terms of language and format. The audience or reader also may have their own idea of what constitutes a specific type of letter, and your organization may have its own format and requirements. There are many types of letters, and many adaptations in terms of form and content. In this chapter, we discuss the fifteen elements of a traditional block-style letter.

Letters may serve to introduce your skills and qualifications to prospective employers, deliver important or specific information, or serve as documentation of an event or decision. Regardless of the type of letter you need to write, it can contain up to fifteen elements in five areas. While you may not use all the elements in every case or context, they are listed in Table 4.2.1.

Table 4.2.1 Elements of a business letter

Return address	This is your address where someone could send a reply. If your letter includes a letterhead with this information, either in the header (across the top of the page) or the footer (along the bottom of the page), you do not need to include it before the date.
Date	The date should be placed at the top left.
Subject	Like a subject line in an e-mail, this is where you indicate what the letter is in reference to, the subject or purpose of the document.
Salutation	Usually something like "Dear." Generally speaking, so as to not assume the pronouns used by recipients of the letter, the first and last name of the recipient are used. e.g., Dear Melissa Ashman,
Message	Typically more than one paragraph.
Complimentary closing	A greeting to close a letter. e.g., Sincerely,
Signature block	Your signature, name (typed), and title (optional)
Identification initials	If the letter was prepared or typed by someone other than the signatory (you), then inclusion of initials is common, as in MJD or abc.
Enclosures (attachments)	Just like an e-mail with an attachment, the letter sometimes has additional documents that are delivered with it. This line indicates what the reader can look for in terms of documents included with the letter, such as brochures, reports, or related business documents. Only include this line if you are in fact including additional documentation.
Copy notification ("cc")	The abbreviation "CC" once stood for carbon copies but now refers to courtesy copies. Just like a "CC" option in an e-mail, it indicates the relevant parties that will also receive a copy of the document.

A sample letter, illustrating the parts of the letter, is shown in Figure 4.2.1. An explanation of the parts of the letter is shown in Figure 4.2.2.

XYZ Event Management Company
2468 Appreciation Road
Vancouver, BC V9Z 6T2

November 10, 2018

Mandy Welmon
ABC Company
12345 120 Street
Surrey, BC V1M 3B5

Re: Quote for January 15-18 conference

Dear Mandy Welmon:

This letter is to provide you with a quote for the logistical support you are requesting for the "International Communication Conference" you will be hosting from January 15-18, 2019.

The costs are as follows:

- Six on-site support staff for January 15, 16, 17, and 18 - $4,500
- Four support staff to assist with set up on January 14 - $1,000
- Four support staff to assist with take down on January 19 - $1,000
- Printing of conference materials - $3,200

The total anticipated costs are $9,700. This quote is valid for 14 days.

ABC Event Management Company has a long history of providing event support to workshops and conferences from 10-1,000 people. We would be delighted to work with you in bringing your vision for the International Communication Conference to life. We look forward to hearing from you.

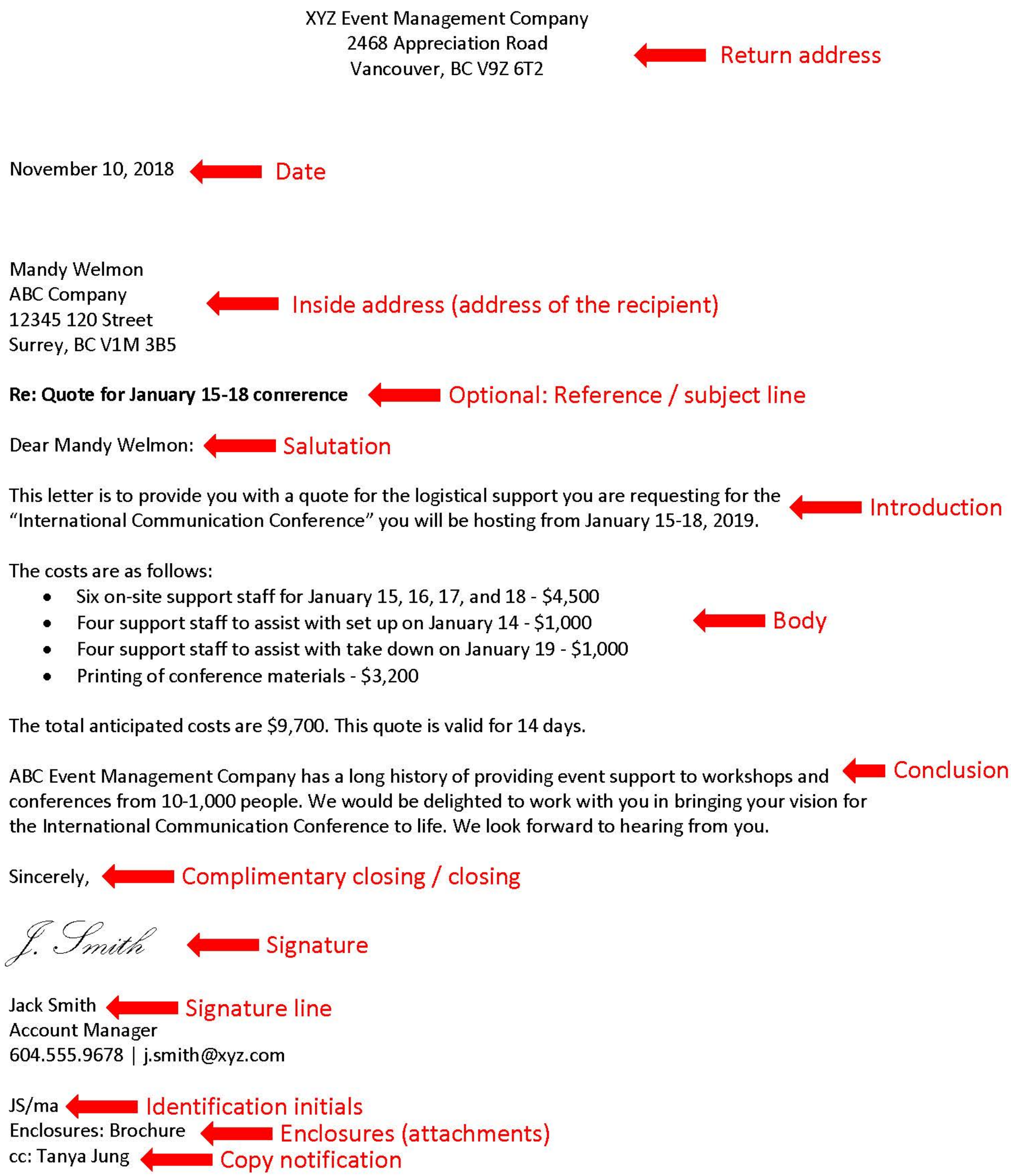
Sincerely,

J. Smith

Jack Smith
Account Manager
604.555.9678 | j.smith@xyz.com

JS/ma
Enclosures: Brochure
cc: Tanya Jung

Figure 4.2.1. A sample letter.



XYZ Event Management Company
2468 Appreciation Road
Vancouver, BC V9Z 6T2

November 10, 2018

Mandy Welmon
ABC Company
12345 120 Street
Surrey, BC V1M 3B5

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Enclosures: Brochure
cc: Tanya Jung

Figure 4.2.2. An explanation of the parts the sample letter.

Reference

Bovee, C., & Thill, J. (2010). *Business communication essentials: A skills-based approach to vital business English* (4th ed.). Upper Saddle River, NJ: Prentice Hall.

Attribution

5.3 Emails

Email is typically quite familiar to most students and workers. While it may be used like text messaging, or synchronous chatting, and it can be delivered to a cell phone, email remains an asynchronous communication tool. In business, email has largely replaced print hard copy letters for external (outside the company) correspondence, as well as taking the place of memos for internal (within the company) communication (Guffey, 2008). Email 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.

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 email in which standard paragraphs are used, but you choose from a menu of sentences to make the wording suitable for a particular transaction.

Emails may be informal in personal contexts, but business communication requires attention to detail, awareness that your email reflects you and your company, and a professional tone so that it may be forwarded to any third party if needed. Email often serves to exchange information within organizations. Although email may have an informal feel, remember that when used for business, it needs to convey professionalism and respect. Never write or send anything that you wouldn't want read in public or in front of your company president or CEO.

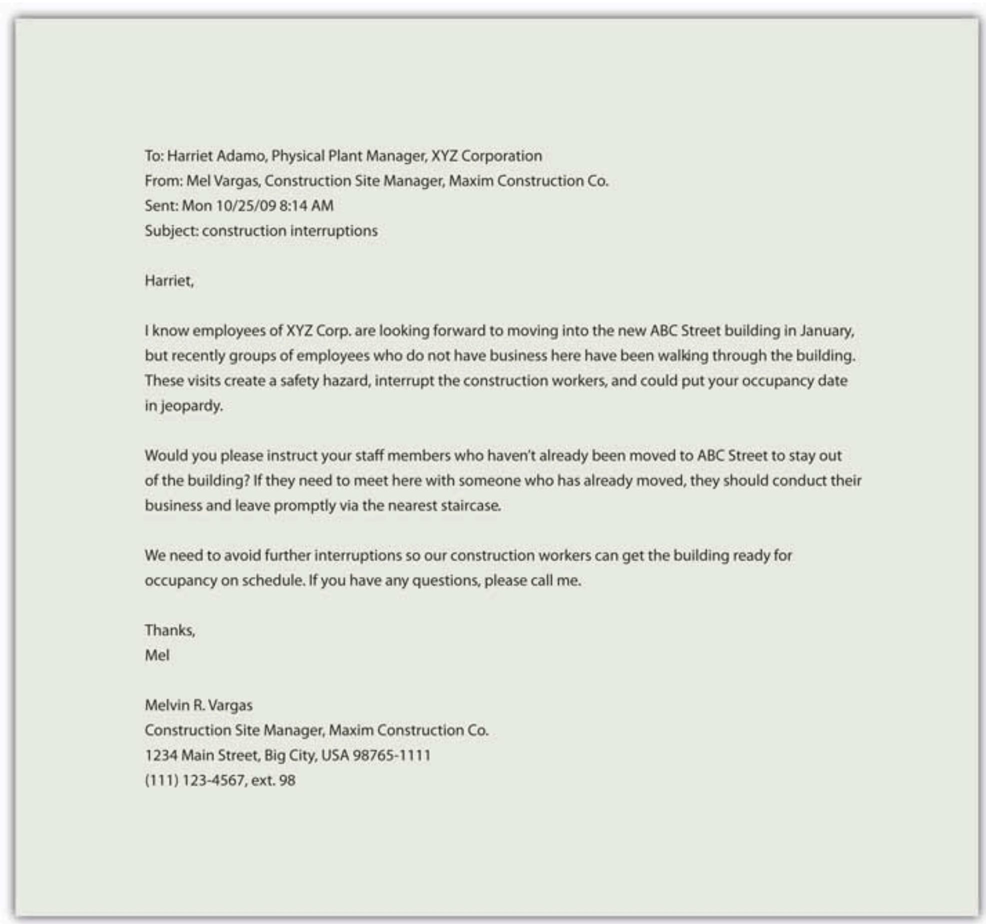
Tips for effective business emails

- Proper salutations should demonstrate respect and avoid mix-ups in case a message is accidentally sent to the wrong recipient. For example, use a salutation like "Dear Ms. X" (external) or "Hi Barry" (internal).
- Subject lines should be clear, brief, and specific. This helps the recipient understand the essence of the message. For example, "Proposal attached" or "Your question of 10/25."
- Close with a signature. Identify yourself by creating a signature block that automatically contains your name and business contact information.
- Avoid abbreviations. An email is not a text message, and the audience may not find your wit cause to them to ROTFLOL (roll on the floor laughing out loud).
- Be brief. Omit unnecessary words.
- Use a good format. Include line breaks between sentences or divide your message into brief paragraphs for ease of reading. A good email should get to the point and conclude in three small paragraphs or less.
- Reread, revise, and review. Catch and correct spelling and grammar mistakes before you press "send." It will take more time and effort to undo the problems caused by a hasty, poorly written email than to get it right the first time.
- Reply promptly. Watch out for an emotional response—never reply in anger—but make a habit of replying to all emails within 24 hours, even if only to say that you will provide the requested information in 48 or 72

hours.

- Use “Reply All” sparingly. Do not send your reply to everyone who received the initial email unless your message absolutely needs to be read by the entire group.
- Avoid using all caps. Capital letters are used on the internet to communicate emphatic emotion or yelling and are considered rude.
- Test links. If you include a link, test it to make sure it is complete.
- Announce email attachments in your message.
- Give feedback or follow up. If you don’t get a response in 24 hours, e-mail or call. Spam filters may have intercepted your message, so your recipient may never have received it.

Figure 4.3.1 provides an example of a business email.



To: Harriet Adamo, Physical Plant Manager, XYZ Corporation
From: Mel Vargas, Construction Site Manager, Maxim Construction Co.
Sent: Mon 10/25/09 8:14 AM
Subject: construction interruptions

Harriet,

I know employees of XYZ Corp. are looking forward to moving into the new ABC Street building in January, but recently groups of employees who do not have business here have been walking through the building. These visits create a safety hazard, interrupt the construction workers, and could put your occupancy date in jeopardy.

Would you please instruct your staff members who haven’t already been moved to ABC Street to stay out of the building? If they need to meet here with someone who has already moved, they should conduct their business and leave promptly via the nearest staircase.

We need to avoid further interruptions so our construction workers can get the building ready for occupancy on schedule. If you have any questions, please call me.

Thanks,
Mel

Melvin R. Vargas
Construction Site Manager, Maxim Construction Co.
1234 Main Street, Big City, USA 98765-1111
(111) 123-4567, ext. 98

Figure 4.3.1 Sample business email.

Netiquette

We create personal pages, post messages, and interact via mediated technologies as a normal part of our lives, but how we conduct ourselves can leave a lasting image, literally. The photograph you posted on your Instagram page may have been seen by your potential employer or that nasty remark in a Facebook post may come back to haunt you later. Several years ago, when the internet was a new phenomenon, Virginia Shea laid out a series of ground rules for communication online that continue to serve us today.

Virginia Shea's rules of netiquette

- Remember the human on the other side of the electronic communication.
- Adhere to the same standards of behaviour online that you follow in real life.
- Know where you are in cyberspace.
- Respect other people's time and bandwidth.
- Share expert knowledge.
- Keep flame wars under control.
- Respect other people's privacy.
- Don't abuse your power.
- Be forgiving of other people's mistakes (Shea, 1994).

Her rules speak for themselves and remind us that the golden rule (treat others as you would like to be treated) is relevant wherever there is human interaction. It is also important to remember to keep your public persona online as professional as possible and to familiarize yourself with the privacy settings of the social media platforms you use.

References

Guffey, M. (2008). *Essentials of business communication* (7th ed.). Mason, OH: Thomson/Wadsworth.
Shea, V. (1994). *Netiquette*. San Francisco, CA: Albion Books.

Attribution

5.4 Proposals

An effective business proposal informs and persuades efficiently. It features many of the common elements of a report, but its emphasis on persuasion guides the overall presentation.

Let's say you work in a health care setting. What types of products or services might be put out to bid? If your organization is going to expand and needs to construct a new wing, it will probably be put out to bid. Everything from office furniture to bedpans could potentially be put out to bid, specifying a quantity, quality, and time of delivery required. Janitorial services may also be bid on each year, as well as food services, and even maintenance. Using the power of bidding to lower contract costs for goods and services is common practice.

In order to be successful in business and industry, you should be familiar with the business proposal. Much like a report, with several common elements and persuasive speech, a business proposal makes the case for your product or service. Business proposals are documents designed to make a persuasive appeal to the audience to achieve a defined outcome, often proposing a solution to a problem.

Common proposal elements

Idea

Effective business proposals are built around a great idea or solution. While you may be able to present your normal product, service, or solution in an interesting way, you want your document and its solution to stand out against the background of competing proposals. What makes your idea different or unique? How can you better meet the needs of the company that other vendors? What makes you so special? If the purchase decision is made solely on price, it may leave you little room to underscore the value of service, but the sale follow-through has value. For example, don't consider just the cost of the unit but also its maintenance. How can maintenance be a part of your solution, distinct from the rest? In addition, your proposal may focus on a common product where you can anticipate several vendors at similar prices. How can you differentiate yourself from the rest by underscoring long-term relationships, demonstrated ability to deliver, or the ability to anticipate the company's needs? Business proposals need to have an attractive idea or solution in order to be effective.

Traditional categories

You can be creative in many aspects of the business proposal, but it can be advantageous to follow the traditional sections (using descriptive or functional headings appropriate to your proposal). Businesses expect to see information in a specific order, much like a resume or even a letter. Each aspect of your proposal has its place, so be sure to use sections effectively to highlight your product or service. Every section is an opportunity to sell, and should reinforce your credibility, your passion, and the reason why your solution is simply the best. These sections are described in Table 4.4.1.

Table 4.4.1 Typical sections in a proposal

Section	Description
Cover page	Title page with name, title, date, and specific reference to request for proposal if applicable.
Executive summary	Like an abstract in a report, this is a comprehensive summary of the product or service and how it meets the requirements and exceeds expectations.
Background	Discuss the history of your product, service, and/or company and consider focusing on the relationship between you and the reader and/or similar companies. What is the business need or problem that you and/or your company can solve? What makes you and/or your company the best choice to solve this problem or provide the product or service?
Proposal	The idea. *Who*, *what*, *where*, *when*, *why*, and *how*. Make it clear and concise. Don't waste words, and don't exaggerate. Use clear, well-supported reasoning to demonstrate your product or service.
Benefits	How will the reader benefit from the product or service? Be clear, concise, specific, and provide a comprehensive list of immediate, short, and long-term benefits to the company. What currently exists in the marketplace, including competing products or services, and how does your solution compare?
Timeline	A clear presentation, often with visual aids, of the process, from start to finish, with specific, dated benchmarks noted.
Finance	What are the initial costs, when can revenue be anticipated, when will there be a return on investment (if applicable)? What are the monetary costs, staffing costs, and other costs? The proposal may involve a one-time fixed cost, but the product or service could be delivered more than once so an extended financial plan noting costs across time is required. What are potential revenues (if applicable)?
Conclusion	Restate your main points clearly. Tie them together with a common theme and make your proposal memorable and professional.

Professional tone and format

A professional document is a base requirement. If it is less than professional, you can count on its prompt dismissal. There should be no errors in spelling or grammar, and all information should be concise, accurate, and clearly referenced when appropriate. Information that pertains to credibility should be easy to find and clearly relevant, including contact information. If the document exists in a hard copy form, it should be printed on a letterhead. If the document is submitted in an electronic form, it should be in a file format that presents your document as you intended. Word processing files may have their formatting changed or adjusted based on factors you cannot control—like screen size—and information can shift out of place, making it difficult to understand. In this case, a portable document format (PDF)—a format for electronic documents—may be used to preserve content location and avoid any inadvertent format changes when it is displayed.

Effective, persuasive proposals are often brief. Clear and concise proposals serve the audience well and limit the range of information to prevent confusion.

Two types of business proposals

Solicited

If you have been asked to submit a proposal, it is considered solicited. The solicitation may come in the form of a direct verbal or written request, but normally solicitations are indirect, open-bid to the public, and formally published for everyone to see. A request for proposal (RFP), request for quotation (RFQ), and invitation for bid (IFB) are common ways to solicit business proposals for business, industry, and the government.

RFPs typically specify the product or service, guidelines for submission, and evaluation criteria. RFQs emphasize cost, though service and maintenance may be part of the solicitation. IFBs are often job-specific in that they encompass a project that requires a timeline, labour, and materials. For example, if a local school district announces the construction of a new elementary school, they normally have the architect and engineering plans on file, but need a licensed contractor to build it.

Unsolicited

Unsolicited proposals are the “cold calls” of business writing. They require a thorough understanding of the market, product, and/or service, and their presentation is typically general rather than customer-specific. They can, however, be tailored to specific businesses with time and effort, and the demonstrated knowledge of specific needs or requirement can transform an otherwise generic, brochure-like proposal into an effective sales message. Getting your tailored message to your target audience, however, is often a significant challenge if it has not been directly or indirectly solicited. Unsolicited proposals are often regarded as marketing materials, intended more to stimulate interest for a follow-up contact than make direct sales. A targeted proposal is typically your most effective approach.

Attribution

5.5 Reports

Reports are designed to record and convey information to the reader and can be used both internally and externally. Reports serve to document new information for specific audiences, goals, or functions. The type of report is often identified by its primary purpose, as in an accident report, a laboratory report, or a sales report. Reports are often analytical or involve the rational analysis of information. Sometimes they report the facts with no analysis at all. Other reports summarize past events, present current data, and forecast future trends. This section will introduce you to the basics of report writing.

Types of reports

Reports come in all sizes but are typically longer than a page and are somewhat shorter than a book. In this chapter, we're focusing on short reports. The type of report depends on its function, and different industries have reports specific to them. For example, science researchers write lab reports, while incident reports are common in health-and-safety environments.

Reports vary by function, style, and tradition. Within your organization, you may need to address specific expectations. This section discusses reports in general terms, focusing on common elements and points of distinction. Reference to similar documents at your workplace may serve you well as you prepare your own report. As shown in Table 4.5.1, there are many types of reports.

Table 4.5.1 Types of reports

Report type	Description
Progress report	Monitor and control production, sales, shipping, service, or related business process.
Recommendation report	Make recommendations to management and provide tools to solve problems or make decisions.
Summary report	Present summaries of the information available on a given subject.

Progress report

A progress report is used to give management an update on the status of a project. It is generated at timed intervals (for example, once a month) or on completion of key stages. It records accomplishments to date and identifies any challenges or concerns. It is usually written by the project lead and is one to two pages long.

When you write a progress report, begin by stating why you are writing the report:

- Identify what you've accomplished
- List any problems you have encountered
- Outline what work still remains
- Conclude by providing an overview of the project's status and what should be done next.

Recommendation report

A recommendation report is used to help management make decisions. The goal of this report is to identify a solution to a problem or suggest a course of action. In it, the writer might suggest that a procedure be adopted or rejected, assess an unsatisfactory situation, or persuade decision makers to make a change that will benefit the organization. For example, the report might suggest ways to enhance the quality of a product, increase profit, reduce cost, or improve workplace conditions. The intention of a recommendation report is not to assign blame or be overly critical, but to suggest improvements in a positive manner.

Summary report

A summary report is used to give management information. For example, if you work in the marketing department, your boss might ask you to find out about your competitors' online activities so that your company can effectively compete with them. To do this, you would research your competitors' websites, social media profiles, digital advertising campaigns, and so on. You would then distill what you find down to the key points so that your boss can get the essential information in a short time, and then decide how to act on it. Unlike the recommendation report, the summary report focuses on the facts, leaving it to management to decide on a course of action.

Report organization

Reports vary by size, format, and function. You need to be flexible and adjust your report to the needs of the audience. Reports are typically organized around six key elements:

- Who the report is about and/or prepared for
- What was done, what problems were addressed, and the results, including conclusions and/or recommendations
- Where the subject studied occurred
- When the subject studied occurred
- Why the report was written (function), including under what authority, for what reason, or by whose request
- How the subject operated, functioned, or was used

Pay attention to these essential elements when you consider your stakeholders. That may include the person(s) the report is about, whom it is for, and the larger audience of the organization. Ask yourself who the key decision makers are, who the experts will be, and how your words and images may be interpreted. While there is no universal format for a report, there is a common order to the information. Each element supports the main purpose or function, playing an important role in the transmission of information. Some common elements in a report are shown in Table 4.5.2.

Table 4.5.2 Parts of a report

Page	Description
Title page	Report title; date of submission; name, title, and organization of the person who prepared the report; name, title, and organization of the person receiving the report. No page number.
Table of contents	A list of the sections in the report and their respective page numbers. All headings/sub-headings in the report should be listed on this page. This page is not labelled with a page number.
Executive summary	Summarize the topic, methods, data/evidence, results, and conclusions/ recommendations. On its own page. Labelled as page iii.
Introduction	Introduces the topic of the report, states the purpose of the report, and previews the structure of the report. Begins on a new page. Labelled as page 1.
Body	Key elements of the report body may include the background, methods, results, and analysis or discussion. Uses descriptive or functional headings and sub-headings (is not labelled "Body"). Pagination continues from the introduction.
Conclusion and/or recommendations	Concise presentation of findings and/or recommendations. Indicate the main results and their relation to the recommended action(s) or outcome(s). Pagination continues from the body of the report.
References	A list of all references used in the report. All in-text citations included in the report should have an accompanying entry in the reference list. Begins on a new page. Pagination continues from the conclusions and/or recommendations.
Appendix or appendices	Related supporting materials. All materials in the appendix (or appendices) must be referred to in the body of the report. Only one item per appendix. Each appendix begins on a new page, is labelled as Appendix A, B, C, etc, and is given a title. Pagination continues from the reference list.

Executive summaries

An executive summary is a brief overview of a document's purpose, results, and conclusions condensed for the quick reading of an executive or manager. It is placed at the beginning of a longer report or proposal and summarizes specific aspects of its content. The reader of the summary is usually not interested in the technical details of a project but is instead interested in costs, marketing, productivity, or efficiency.

Executive summaries vs. abstracts

Executive summaries and abstracts are similar, but an executive summary is typically longer. It usually runs about one or two double-spaced pages (or about five percent of the length of the full report), while an abstract is usually only six to eight sentences. An executive summary is geared to executives, managers, or investors, while an abstract is intended for an academic audience. An executive summary stresses results or conclusions, but an abstract may give equal time to problem definition, methods, results, and conclusions.

Style

As an accompaniment to a report, an executive summary shares the report's formal tone and emphasis on direct, clear, concise, specific language. The summary should be original: don't copy and paste sentences from the full report. To keep the word count down, omit lengthy transitions and examples. Avoid highly technical language, and briefly define any technical terms you must use.

Introduce the problem

Omit an elaborate introduction; however, you may choose to open with an introductory sentence designed to capture the reader's attention. An eye-catching introduction that establishes a problem can be especially effective when your purpose is to persuade—perhaps you want investors to buy into a business plan, or you want executives to make a change in policy. Begin with a clear idea of what your summary can accomplish, then craft your introductory sentence.

Once you have introduced the problem, hopefully with a bit of flair, detail it and explain how addressing it introduces an improvement or benefit. Use specifics whenever possible.

E.g. Waiting weeks for an appointment or standing in a long line to get help is discouraging, but if the University Writing Center can't recruit more consultants soon, that's where our Aggie writers will be—frustrated and looking elsewhere for advice.

Sell the solution

Once you have established a problem, present the solution. If the original report explains how the problem was addressed (methods) and if methods were a significant factor in coming up with a solution or of particular importance to executive readers, then briefly describe them. If, for example, you are suggesting a change in recruiting methods, you might want to explain the steps you took to discover the most effective methods.

You need to sell your solution, so include as many specifics as you can rather than generalizations.

(E.g. "The improved distribution plan should result in a 25% increase in sales for the coming year" rather than "We're optimistic about the future.") Don't gloss over any potential problems or limitations; instead, briefly explain how these issues are being addressed or can be minimized. Also, don't include anything the report doesn't specifically cover.

Close the deal

End with explicit recommendations based on the document's results. This section will probably make up the bulk of the summary because ultimately what concerns the executive reader is results and effects on the organization. It's important to continue including specific figures in the recommendations section.

E.g. On the basis of our analysis, we recommend that the University Writing Center take the following steps:

- produce and distribute a promotional video that outlines the benefits of working as a writing consultant
- increase the visibility of the employment opportunities on our website
- advertise positions through targeted bulk email to qualified students

The modest outlay of $350 to cover consultant labor and promotional materials is estimated to bring in approximately 50-60 new applications per year.

Make sure your executive summary includes all the pertinent information. Think about what an executive would need to know in order to make a decision about changing a policy, undertaking an action, or spending money and then provide that information as specifically and concisely as you can.

Here is a checklist for ensuring that a report fulfills its goals:

- Report considers the audience's needs
- Form follows function of report
- Format reflects institutional norms and expectations
- Information is accurate, complete, and documented
- Information is easy to read
- Terms are clearly defined
- Figures, tables, and art support written content
- Figures, tables, and art are clear and correctly labelled
- Figures, tables, and art are easily understood without text support
- Words are easy to read (font, arrangement, organization)
- Results are clear and concise
- Recommendations are reasonable and well-supported
- Report represents your best effort

- Report speaks for itself without your clarification or explanation

Formatting a report

Make it easier for your reader to understand the information in your report by formatting your document cleanly. Here are a few guidelines:

- Use size 10-12 pt type in a standard business font, such as Times New Roman, Arial, or Calibri
- Use a minimum of 1-inch margins on all sides
- Use headings and sub-headings to divide the content into clear sections
- Separate paragraphs using white space
- Use visuals (such as charts, graphs, or diagrams) where they will help in explaining numbers or other information that would be difficult to understand in text form

Attribution

5.6 Persuasive appeals

Once you know who your intended audience is and what your purpose is for writing, you can make specific decisions about how to shape your message. No matter what, you want your audience to stick around long enough to read your whole piece. How do you manage this magic trick? Easy. You appeal to them. You get to know what sparks their interest, what makes them curious, and what makes them feel understood. The one and only Aristotle provided us with three ways to appeal to an audience, and they're called *logos, pathos,* and *ethos*. You'll learn more about each appeal in the discussion below, but the relationship between these three appeals is also often called *the rhetorical triangle* as shown in Figure 4.6.1.

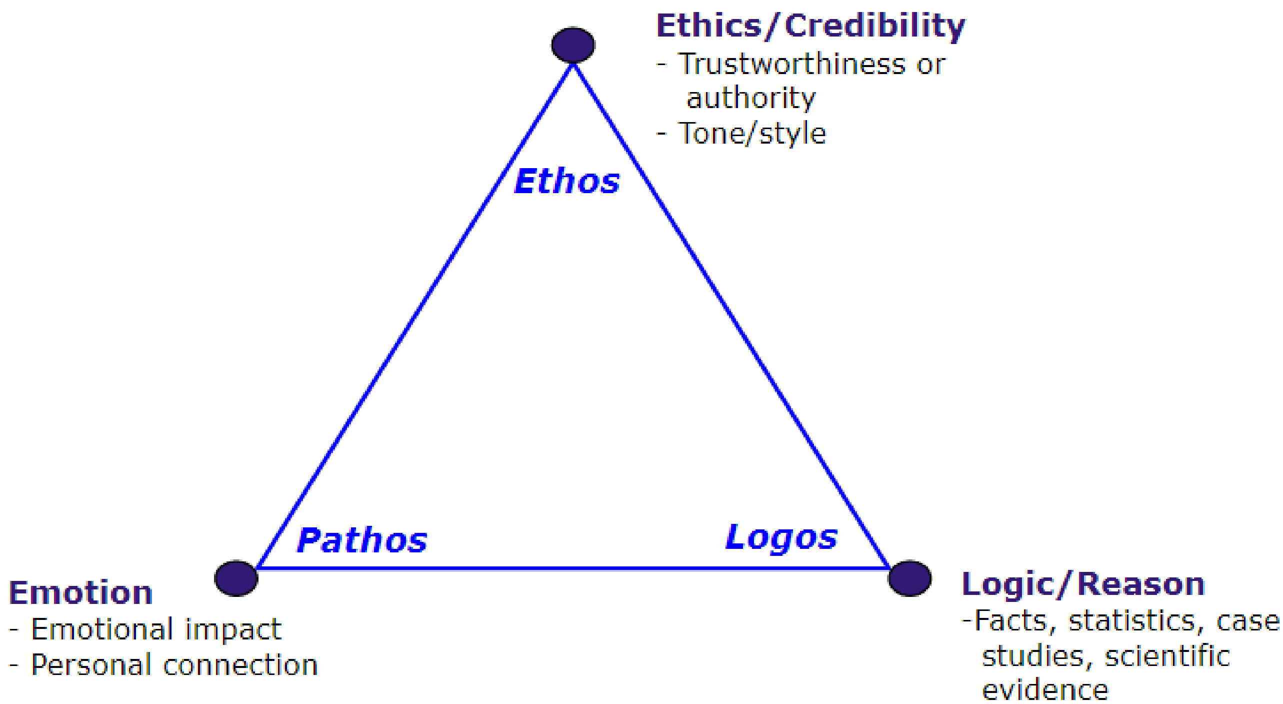


Figure 4.6.1. The rhetorical triangle

Pathos

Latin for emotion, *pathos* is the fastest way to get your audience's attention. People tend to have emotional responses before their brains kick in and tell them to knock it off. Be careful though. Too much *pathos* can make your audience feel emotionally manipulated or angry because they're also looking for the facts to support whatever emotional claims you might be making so they know they can trust you.

Logos

Latin for logic, *logos* is where those facts come in. Your audience will question the validity of your claims; the opinions you share in your writing need to be supported using science, statistics, expert perspective, and other types of logic. However, if you only rely on *logos*, your writing might become dry and boring, so even this should be balanced with other appeals.

Ethos

Latin for ethics, *ethos* is what you do to prove to your audience that you can be trusted, that you are a credible source of information. (See *logos*.) It's also what you do to assure them that they are good people who want to do the right thing. This is especially important when writing an argument to an audience who disagrees with you. It's much easier to encourage a disagreeable audience to listen to your point of view if you have convinced them that you respect their opinion and that you have established credibility through the use of *logos* and *pathos*, which show that you know the topic on an intellectual and personal level.

Fallacies

Regardless of what appeals you use in your writing, it is important to be aware of fallacies (errors in reasoning) because they can reduce the impact of your message on your reader. For more information on common fallacies, refer to these resources available from the Writing Commons:

- Logical fallacies: https://writingcommons.org/section/rhetoric/rhetorical-reasoning/rhetorical-appeals/logos/logical-fallacies/
- Emotional fallacies: https://writingcommons.org/article/fallacious-pathos/
- Ethical/credible fallacies: https://writingcommons.org/article/fallacious-ethos/

Attribution

5.7 Persuasive messages

A persuasive message is the central message that intrigues, informs, convinces, or calls to action. Persuasive messages are often discussed in terms of reason versus emotion. Every message has elements of ethos, or credibility; pathos, or passion and enthusiasm; and logos, or logic and reason. If your persuasive message focuses exclusively on reason with cold, hard facts and nothing but the facts, you may or may not appeal to your audience. People make decisions on emotion as well as reason, and even if they have researched all the relevant facts, the decision may still come down to impulse, emotion, and desire. On the other hand, if your persuasive message focuses exclusively on emotion, with little or no substance, it may not be taken seriously. Finally, if your persuasive message does not appear to have credibility, the message may be dismissed entirely.

In general, appeals to emotion pique curiosity and get our attention, but some attention to reason and facts should also be included. That doesn't mean we need to spell out the technical manual on the product on the opening sale message, but basic information about design or features, in specific, concrete ways can help an audience make sense of your message and the product or service. Avoid using too many abstract terms or references, as not everyone will understand these. You want your persuasive message to do the work, not the audience.

Typical format of a persuasive message

The four parts of a persuasive message are shown in Table 4.7.1.

Table 4.7.1. Four parts of a persuasive message

Part	Description
Attention statement (or hook)	Use humour, novelty, surprise, an unusual fact, or a question to get the attention of your audience.
Introduction	Build interest by appealing to your audience's needs and wants and include a purpose statement to set up expectations.
Explanation	Establish credibility and build your relationship with your audience, discuss attractive features, and compare with competitors addressing concerns or potential questions before they are even considered.
Call to action	Sum it up and offer solution steps or calls to action, motivating your audience to take the next step. The smaller the step, the more likely your audience will comply. Set up your audience for an effective closing. It should be clear what your audience should do, by when, and how.

Your persuasive message will compete with hundreds of other messages your audience receives and you want it to stand out (Price, 2005). One effective way to do that is to make sure your attention statement (or hook) and introduction clearly state how your audience will benefit. For example:

- Will the product or service save time or money?

- Will it make them look good?
- Will it entertain them?
- Will it satisfy them?

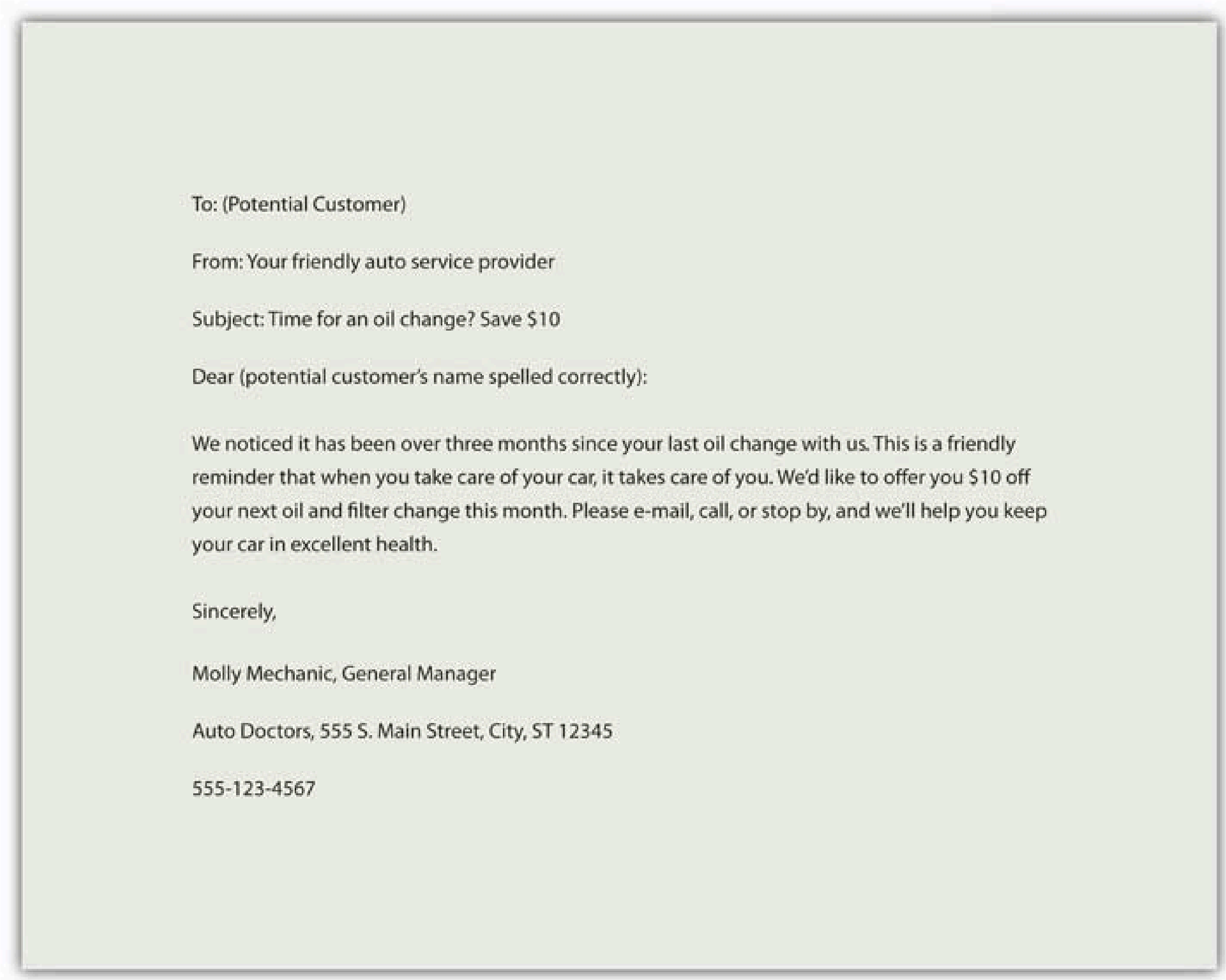
Regardless of the product or service, the audience is going to consider first what is in it for them. A benefit is what the audience gains by doing what you're asking them to do and this is central to your persuasive message. They may gain social status, popularity, or even reduce or eliminate something they don't want. Your persuasive message should clearly communicate the benefits of your product or service (Winston & Granat, 1997).

Strategies for persuasive messages

Your product or service may sell itself, but you may want to consider using some strategies to help ensure your success:

1. **Start with your greatest benefit**. Use it in the headline, subject line, caption, or attention statement. Audiences tend to remember the information from the beginning and end of a message, but have less recall about the middle points. Make your first step count by highlighting the best feature first.
2. **Take baby steps**. Promote, inform, and persuade on one product or service at a time. You want to hear "yes," and if you confuse the audience with too much information, too many options, steps to consider, or related products or service, you are more likely to hear "no" as a defensive response as the audience tries not to make a mistake. Avoid confusion and keep it simple.
3. **Know your audience**. The more background research you can do on your audience, the better you can anticipate their specific wants and needs and tailor your persuasive message to meet them.
4. **Lead with emotion, and follow with reason**. Gain the audience's attention with drama, humour, or novelty and follow with specific facts that establish your credibility, provide more information about the product or service, and lead to your call to action.

These four steps can help improve your persuasive messages. Invest your time in planning and preparation, and consider the audience's needs as you prepare your messages. Figure 4.7.1 provides an example of a persuasive email message.



To: (Potential Customer)

From: Your friendly auto service provider

Subject: Time for an oil change? Save $10

Dear (potential customer's name spelled correctly):

We noticed it has been over three months since your last oil change with us. This is a friendly reminder that when you take care of your car, it takes care of you. We'd like to offer you $10 off your next oil and filter change this month. Please e-mail, call, or stop by, and we'll help you keep your car in excellent health.

Sincerely,

Molly Mechanic, General Manager

Auto Doctors, 555 S. Main Street, City, ST 12345

555-123-4567

Figure 4.7.1 Sample persuasive email

In this message, the writer has combined emotion and reason and reinforced their credibility in order to create interest in their service, hopefully leading to a sale.

References

[1]

[2]

1. Price, D. (2005). *How to communicate your sales message so buyers take action now!* Retrieved from http://ezinearticles.com/?How-To-Communicate-Your-Sales-Message-So-Buyers-Take-Action-Now!&id=89569.
2. Winston, W., & Granat, J. (1997). *Persuasive advertising for entrepreneurs and small business owners: How to create more effective sales messages*. New York, NY: Routledge.

Attribution

5.8 Starting your job search

The job search is more than finding a job posting for which you fulfill the requirements. This planning phase allows you to gather the information and language that you need to make yourself a strong applicant.

Know yourself

As you begin the process of finding and applying for employment in your chosen field, it is important to take stock of your education, technical skills, and the experiences and characteristics that make you an ideal employee and co-worker. This self-assessment is the foundation for building strong job materials.

Beyond evaluating your skill set, this is also an opportunity to take stock of the types of environments you will thrive in:

- Do you work better independently or in groups?
- Have you always imagined working for a large company, with the structure and perks that offers? Or do you see yourself working on a smaller team, perhaps taking risks for a project you believe in personally?
- Do you like developing new ideas and planning? Do you like seeing through a complex project to the finish?

Use this information as you search for potential jobs and evaluate employers. Seeking out a work environment and job that suits your strengths and preferences will give you an advantage in the job search and in your career.

Know your field

Use the resources available to you (such as career services, job websites, networking events) to find positions. Go to career fairs and make connections. Even before you are truly "on the market," career fairs and networking events are great ways to build your confidence and become comfortable in professional environments.

Keep yourself informed and up-to-date on the projects and initiatives happening within your chosen field and especially of those employers that most interest you. This is not something you only do the night before a career fair or an interview – expose yourself to these ideas and discussions over a long period of time. These types of resources are a great place to get started:

- **Organizations and conferences.** Connecting with and simply being aware of the national organizations will expose you to current ideas and developments in the field. Most host conferences on a regular basis and even just reading the call for presentations or the titles and abstracts from a recent conference will introduce you to new terms and concepts, laying groundwork for future learning or research.
- **Company blogs or white papers.** Most companies "talk to" the public or the industry in some way to manage public perception, promote accomplishments, and (often) recruit employees. These might be highly technical or more casual or promotional in tone, depending on the company culture, industry, and their goals – any of these provide valuable insights.
- **Social media.** Following both companies and individual professionals will introduce you to their work, concerns, and developments in the industry. It also might make it easy for you to get exposed to these ideas as part of your regular online habits.

- **Local networking or meetup groups.** Professionals often hold events at a local level to meet each other and learn about what other companies in the area are doing. These might be purely social or they might include learning opportunities in the form of talks and presentations. On campus, you will also find a variety of discipline-specific groups and students organizations that can also expose you to new ideas and resources, not to mention great professional connections.

Learn your industry language

Build a vocabulary! Part of what you are doing as you prepare yourself for your career is learning a language – you are developing vocabulary and learning the language of your profession in addition to developing the required technical technical skills.

Soft skills

In the process of completing your self-assessment, you probably discovered that you have lots of skills and strengths seemingly unrelated to your field. It’s important to remember that even unrelated experiences have taught you “transferable skills” – skills that may not be technically related, but are considered important to any field.

These “soft” skills are consistently ranked high on employer lists of desired attributes and include organizational skills, leadership abilities, teamwork experience, communication skills, problem solving, meeting deadlines, and so on. In the job search process, it is important to be able to describe your previous experiences in language that employers recognize as valuable. Table 4.8.1 lists some common skill attributes and ways to describe them.

Table 4.8.1 Phrasing for common skill attributes

Organization management & leadership	Research & planning	Communication	Interpersonal	Other
Initiating new ideasCoordinating tasks Being detail-oriented Managing or directing teams or groups Coaching Selling ideas or products Decision-making Managing conflicts or problems Managing budgets	ForecastingComing up with ideas Identifying problems Developing solutions Solving problems Imagining alternatives Gathering information Analyzing and evaluating information Setting goals Defining needs and requirements	Speaking effectivelyWriting concisely Listening attentively Facilitating group discussion Providing appropriate feedback Being tactful Negotiating Persuading Interviewing Editing	Being sensitive to feelings and moods of othersListening Developing rapport Providing support Motivating Negotiating Sharing credit Teaching/training Delegating Cooperating; working with a team	Managing time effectivelySetting and meeting goals Being a self-starter; self-motivated Working independently Enlisting help when needed Meeting deadlines Being diligent; tenacity to get the job done; follow-through Being responsible and reliable

Know the job

Oftentimes, a job description describes the a "perfect" candidate. The advertisements are a long list of every possible skill, attribute, and set of experiences a company wants in a potential employee. However, realistically, very few people may have all the qualifications listed. Employers will likely have in the backs of their minds the skills they consider transferable or learnable, and it is in your best interest to figure out where the employer may be willing to make skill and/or experiential trade-offs.

When you've found a job advertisement, you should read it several times and highlight key words and skills. Note what specific qualifications are required for the position and the language used to describe these qualifications (such as "must have," "needs," "should be," and "ideally"). Compare this to the qualifications you have that are the same or transferable and note how you can effectively and specifically describe your qualifications to address the needs and wants outlined in the job description. In your cover letter and resume, it then becomes your mission to persuade the employer you should be interviewed (and then hired) based on your qualifications and transferable skills.

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5.9 Resumes

A resume is a document that summarizes your education, skills, talents, employment history, and experiences in a clear and concise format for potential employers. The resume serves three distinct purposes that define its format, design, and presentation:

1. To represent your relevant professional information in writing
2. To demonstrate the relationship between your professional information and the problem or challenge the potential employer hopes to solve or address, often represented in the form of a job description or duties
3. To get you an interview by clearly demonstrating you meet the minimum qualifications and have the professional background help the organization meet its goals

Regardless of the format, employers have expectations for your resume. They expect it to be clear, accurate, and up to date (Bennett, 2005). This document represents you in your absence, and you want it to do the best job possible. You don't want to be represented by spelling or grammatical errors, as they may raise questions about your education and attention to detail. Someone reading your resume with errors will only wonder what kind of work you might produce that will poorly reflect on their company. There is going to be enough competition that you don't want to provide an easy excuse to toss your resume at the start of the process. Do your best work the first time. Table 4.9.1 highlights some common types of resumes.

Table 4.9.1 Common types of resumes

Type	Function	Advantage	Disadvantage
Chronological	Chronological resumes (which list items in reverse time order) focus on work history.	Demonstrates a consistent work history	It may be difficult to highlight skills and experience.
Functional	Functional resumes (also called competency-based resumes) focus on skills.	Demonstrates skills that can clearly link to job functions or duties	It is often associated with people who have gaps in their employment history.
Combination	A combination resume lists your skills and experience first, then employment history and education.	Highlights the skills you have that are relevant to the job and provides a reverse chronological work history	Some employers prefer a reverse chronological order.
Scannable	A scannable resume is specifically formatted to be read by a scanner and converted to digital information.	Increasingly used to facilitate search and retrieval, and to reduce physical storage costs	Scanners may not read the resume correctly.

Main parts of a resume

Resumes have several basic elements that employers look for, including your contact information, objective or goal, education and work experience, and so on. Each resume format may organize the information in distinct ways based on the overall design strategy, but all information should be clear, concise, and accurate (Simons & Curtis, 2004). The content in your resume should be carefully selected to present the best, most applicable qualifications for a particular employer (the company and position for which you are applying) or purpose (attending a career fair).

Contact information

This section is often located at the top of the document. The first element of the contact information is your name. You should use your full, legal name even if you go by your middle name or use a nickname. There will plenty of time later to clarify what you prefer to be called, but all your application documents, including those that relate to payroll, your social insurance number, background checks, transcripts, certificates, or degrees, should feature your legal name. Other necessary information includes your phone number and email address. For business purposes, do not use an unprofessional email address like ilovedogssooooomuch@....com or teddybears@....com. Create a new e-mail account if needed with an address suitable for professional use. If you have more than one phone number at which you can be reached, list the one you're most likely or most easily able to answer. (Don't make it confusing for an employer to guess which number at which to call you.)

Objective

This is one part of your resume that is relatively simple to customize for an individual application. Your objective should reflect the audience's need to quickly understand how you will help the organization achieve its goals. An example of an objective is shown in Figure 4.9.1.

Objective: To contribute to an increase in sales at ABC Corporation as a sales representative.

Figure 4.9.1 Sample objective statement on a resume

Education

You should list your education in reverse chronological order, with your most recent education first. List the school, credential type (e.g., diploma, certificate, degree), and the full credential name. Don't use abbreviations for your university/college or program. For example, if you're completing a BBA-Accounting, spell it out in full (Bachelor of Business Administration in Accounting). If you went to a college or university that may not be known in the area where the organization is that you're applying for a job, include the city and country alongside the name of the school. If you have some post-secondary education, you can include by this indicating you are in progress. In most circumstances, it is preferable to omit your high school education.

Work experience

List in reverse chronological order your employment history, including the positions, companies, locations, dates, duties, and skills demonstrated or acquired. You may choose to use active, descriptive sentences or bullet lists, but be consistent. Emphasize responsibilities that are relevant to the specific job for which you're applying, but don't let emphasis become exaggeration. This document represents you in your absence, and if information is false, at a minimum you could lose your job. Be specific, be precise, and quantify details whenever possible. For example, instead of saying "managed employees during the night shift," you could quantify that statement by saying "supervised 8 employees during 9-hour overnight shifts." Use the present tense to describe positions you currently hold and the past tense to describe positions you no longer hold.

Other relevant qualifications

If you have received awards or honours; given presentations; published papers or other materials; or have other qualifications of note and relevance to the position for which you're applying, you can list these in an appropriately named section on your resume. Don't include a list of your personal interests or hobbies. If you are wondering whether or not to include a piece of information, focus on the audience's needs. Will they find this information valuable in making a decision about you as a candidate? Does it reveal something important about your skills, interests, and qualifications? Does it reveal something new about you that is not already revealed in your resume?

References

You may choose to include references at the end of your resume, though simply writing "references available upon request" is more common (and often more appropriate).

Additional resume strategies

Length

You may also be tempted to extend your resume to more than one page, but don't exceed that limit unless the additional page(s) will feature specific, relevant information that represents several years of work that directly relates to the position. The person reading your resume may be sifting through many applicants and will not spend time reading several extra pages if the content is not directly relevant.

Use key words

Just as there are common search terms and common words in relation to each position, job description, or description of duties, your resume should mirror these common terms when and where appropriate.

Follow directions

If a job description uses specific terms, refers to computer programs, skills, or previous experience, make sure you incorporate that language in your resume (assuming you have those skills or experience!). You know that when given a class assignment, you are expected to follow directions; similarly, the employer is looking for specific skills and experience. By mirroring the employer's language and submitting your application documents in accord with their instructions, you convey a spirit of cooperation and an understanding of how to follow instructions.

Make it easy to read

You need to make sure your resume is easy to read. Use white space between sections. Use emphasis (such as bolding, italicizing, underlining, or all caps) consistently to draw attention to headings or things of note, but avoid using multiple types of emphasis at one. For example, don't bold, underline, and italicize the heading for your work experience section. Choose an easy-to-read font that is typically used in business documents, such as Times New Roman, Arial, or Calibri. Avoid using less common font types, which may be difficult to read. A font size of 11 or 12 is easier to read for most people. Be consistent and purposeful in the visual design of your resume. Align bullet points consistently. Use the same types of bullet points in your resume. Align your resume content consistently. Remember that whomever will be reviewing resumes will likely be looking at many documents in a row and may be working quickly!

Sample resumes

A sample of a chronological resume is shown in Figure 4.9.2.

Name
Street Address
City, State, Zip Code
Cell Phone
Home Phone/Office Phone
E-mail Address

Objective or Statement of Interest

Clear and concise statement of professional goal that may include job or position and may also indicate a field (financial services, human resources).

Employment Experience

- List in reverse chronological order (i.e., put the most recent position first).
- Note the job title, the company, and dates of employment.
- Include clear statements of work performed as part of your job responsibilities, using language similar to the job announcement.
- If the job announcement emphasizes supervisory experience, for example, this should be an area of emphasis in your descriptions of tasks performed.
- Indicate the most important or relevant job responsibilities or skills involved with those tasks first in priority order.
- Include awards, citations, or commendations that relate to your objective or statement of interest.

Education

List earned degrees and incomplete education if applicable:

- Undergraduate Studies, 86 credits, University of State
- Associate of Applied Science (AAS) in Computer Information Systems, Community College of State, 2005
- High School Diploma, City High School, GPA or class rank
- Include technical certificates and completed trainings if they directly relate to your objective or statement of interest.

Community Service

List activities, your role, and, if applicable and space is available, your accomplishments:

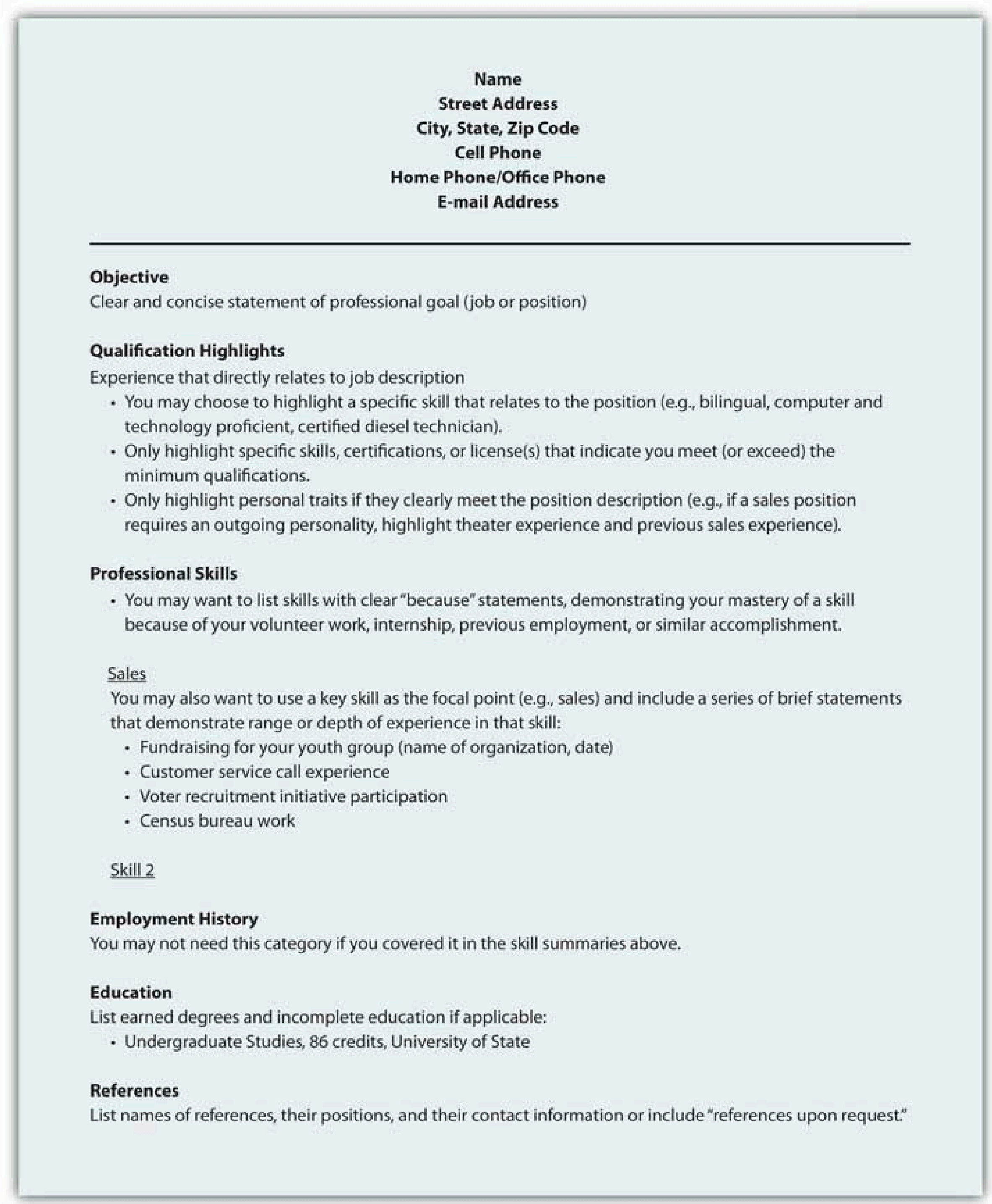
- Eagle Scout, Troop #12345, 1998–2001
- Youth Choir Leader, Community Interfaith Church, 1995–2001
- Students in Free Enterprise Team, City High School, 1998–2001

References

List names of references, their positions, and their contact information or include "references upon request."

Figure 4.9.2 A sample of a chronological resume

Whereas the chronological resume focuses on employment history, a functional resume, as shown in Figure 4.9.3, highlights skills.



Name
Street Address
City, State, Zip Code
Cell Phone
Home Phone/Office Phone
E-mail Address

Objective
Clear and concise statement of professional goal (job or position)

Qualification Highlights
Experience that directly relates to job description

- You may choose to highlight a specific skill that relates to the position (e.g., bilingual, computer and technology proficient, certified diesel technician).
- Only highlight specific skills, certifications, or license(s) that indicate you meet (or exceed) the minimum qualifications.
- Only highlight personal traits if they clearly meet the position description (e.g., if a sales position requires an outgoing personality, highlight theater experience and previous sales experience).

Professional Skills

- You may want to list skills with clear "because" statements, demonstrating your mastery of a skill because of your volunteer work, internship, previous employment, or similar accomplishment.

Sales
You may also want to use a key skill as the focal point (e.g., sales) and include a series of brief statements that demonstrate range or depth of experience in that skill:

- Fundraising for your youth group (name of organization, date)
- Customer service call experience
- Voter recruitment initiative participation
- Census bureau work

Skill 2

Employment History
You may not need this category if you covered it in the skill summaries above.

Education
List earned degrees and incomplete education if applicable:

- Undergraduate Studies, 86 credits, University of State

References
List names of references, their positions, and their contact information or include "references upon request."

Figure 4.9.3 A sample of a functional resume

References

Bennett, S. A. (2005). *The elements of résumé style: Essential rules and eye-opening advice for writing résumés and cover letters that work*. New York, NY: Amacon.

Simons, W., & Curtis, R. (2004). *The Résumé.com guide to writing unbeatable résumés*. New York, NY: McGraw-Hill.

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5.10 Cover letters

Traditionally, the application letter or cover letter is a formal letter that accompanies your resume when you apply for a position. Its purpose is to support your resume, providing more specific details, and to explain in writing why you are a strong candidate for the specific position to which you are applying. It should not simply reiterate your resume; it's an opportunity for you to make a case for your candidacy in complete sentences and phrases, which gives the reader a better sense of your "voice."

It can be helpful to start by first thinking about the audience and purpose for the application letter. What information does your reader need to glean from your letter? At what point in the hiring process will they be reading it?

As you draft the letter, consider what you would want to say if you were sitting across the desk from your reader. It should be written in a formal, professional tone, but you still want it to flow like natural speech—this will make it easier for your reader to absorb the information quickly.

What to include

It can be helpful to think about writing your application letter in sections or "blocks." This provides a basic structure for the letter; once you have an understanding of this foundation, you can customize, update, and personalize the letter for different applications and employers.

Introductory paragraph

Open your letter with a concise, functional, and personable introduction to you as a job candidate. This is your chance to establish the essential basics of your qualifications and to set the themes and tone for the rest of the letter.

- Name the position you're interested in (by exact name and number, if available)
- Clearly state that you are applying for the position—remember that you are requesting (not demanding) that they consider you as a candidate for the position
- Summarize your best qualification and how it's relevant to the position
- Indicate you've enclosed your resume for additional information

Optionally, you might also take the opportunity at the beginning of the letter to express your interest in working for this particular company and/or your passion for and interest in the field—I am particularly interested in this position because… This sets a nice tone and shows that you are engaged and enthusiastic. It is also an opportunity to demonstrate your knowledge about the employer and what they do (developed through your research).

Education & academics paragraph(s)

The purpose of this paragraph is to paint a detailed picture of your training and credentials and how this is relevant to the position. Your opportunity in this paragraph is to explain the activities and knowledge you have gained and/or are developing that most matter for this position and employer. Carefully consider what the employer will value most about your educational experiences. If you have a lot of project experience or several key experiences that you want to highlight, this information may be written in multiple paragraphs.

This content should NOT be a laundry list of course titles. Instead, describe how your academics/training have shaped your understanding of the field you are entering and significant skills you are developing, but always tie it back to what the employer is looking for—stay focused on the information your audience needs and what they will care about.

Employment paragraph (if applicable)

It is important for employers to feel that they are hiring responsible, reliable people who know how to hold down a job. If you do have work experience in this field such as a previous internship, this is a perfect time to discuss that. If you have previous work experience, even if it's not related to your field, this is your opportunity to describe the value of that experience—the value for you, but, more importantly, to your reader. Describe your previous work experience that shows your a good employee and explain how this is relevant to the position. Be specific about the company, the time frame, your responsibilities, and the outcomes/results. Focus on your relevant and transferable skills.

Other qualifications (if applicable)

Awards you've received; publications you've achieved; and your activities and involvement in things outside of your coursework and work experiences, such as student organizations, clubs, and volunteer work, are great pieces of information to include that show you are a well-rounded, motivated person with good time management skills. Personal, human connections are an important part of the job application process, and describing some of these activities and interests can help your reader start to feel a more personal connection. Describe your specific actions and involvement honestly, while still trying to connect to transferable skills and the keywords in the job posting.

Concluding Paragraph

As you conclude the letter, tie everything together, politely express interest in an interview, and end on a positive note. Don't ask for the job here; you're requesting–and not demanding–an interview.

Letter formatting

Your application letter should use formal letter formatting.

In today's job market, where many applications are online, the letter might be delivered in a variety of different formats. For example, it might be a PDF file uploaded to an online application system or if might be simply sent in the body of an email. Make sure you submit your cover letter in the file format and way the job advertisement specifies.

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5.11 Bad news messages

A bad news message (or negative news message) delivers news that the audience does not want to hear, read, or receive. Delivering negative news is never easy. Whether you are informing someone they are being laid off or providing constructive criticism on their job performance, how you choose to deliver the message can influence its response (Bovee & Thill, 2010). Some people prefer their bad news to be direct and concise. Others may prefer a less direct approach. Regardless whether you determine a direct or indirect approach is warranted, your job is to deliver news that you anticipate will be unwelcome, unwanted, and possibly dismissed.

In this section we will examine several scenarios that can be communicated internally (within the organization) and externally (outside the organization), but recognize that the lines can be blurred as communication flows outside and through an organization or business. Internal and external communication environments often have a degree of overlap. The rumour of anticipated layoffs may surface in the local media, and you may be called upon to address the concern within the organization. In a similar way, a product that has failed internal quality control tests will require several more tests and improvements before it is ready for market, but if that information leaves the organization, it can hurt the business reputation, prospects for future contracts, and the company's ability to secure financing.

Goals of bad news messages

Your ability to manage, clarify, and guide understanding is key to addressing challenges while maintaining trust and integrity with your employees, stakeholders, and the public.

There are seven goals to keep in mind when delivering negative news, in person or in written form:

1. Be clear and concise to minimize the chances of confusion or back-and-forth communication.
2. Help the receiver understand and accept the news.
3. Maintain trust and respect for the business or organization and for the receiver.
4. Avoid legal liability or erroneous admission of guilt or culpability.
5. Maintain the relationship, even if a formal association is being terminated.
6. Reduce the anxiety associated with the negative news to increase comprehension.
7. Achieve the designated business outcome.

Scenarios

Let's go through some scenarios. Let's say you're a supervisor and have been given the task of discussing repeated lateness with an employee called Brian. Brian has frequently been late for work, and the problem has grown worse over the last two weeks. The lateness is impairing not only Brian's performance, but also that of the entire work team. Your manager has instructed you to put an end to it. The desired result is for Brian to stop being late and to improve his performance.

You can

1. stop by Brian's cubicle and simply say, "Get to work on time or you are out"
2. invite Brian out to a nice lunch and let him have it
3. write Brian a stern e-mail

4. ask Brian to come to your office and discuss the behaviour with him in private

While there are many other ways you could choose to address the situation, let's examine each of these four alternatives in light of the goals to keep in mind when presenting negative news.

Scenario 1

First, you could approach Brian in his work space and speak to him directly. Advantages to this approach include the ability to get right to the point right away. However, this approach could strain your supervisor-employee relationship as a result of the public display of criticism, Brian may not understand you, there is a lack of a formal discussion you can document, and there is a risk that your actions may not bring about the desired results.

The goals of delivering a negative message include the desire to be clear and concise in order to avoid having a back-and-forth conversation where you're continually providing clarification. The approach described above does not provide the opportunity for discussion, feedback, or confirmation that Brian has clearly understood your concern. It fails to address the performance concern and it limits the correction to the lateness. Overall, it fails to demonstrate respect for all parties. The lack of tact apparent in the approach may reflect negatively on you as the supervisor and your supervisors or managers.

When you need to speak to an employee about a personnel concern, it is always best to do it in private. Give thought and concern to the conversation before it occurs, and make a list of points to cover with specific information, including grievances. Like any other speech, you may need to rehearse, particularly if this type of meeting is new to you. When it comes time to have the discussion, issue the warning, back it up in writing with documentation, and don't give the impression that you might change your decision. Whether the issue at hand is a simple caution about tardiness or a more serious conversation, you need to be fair and respectful, even if the other person has been less than professional. Let's examine the next alternative.

Scenario 2

Let's say you invite Brian to lunch at a nice restaurant. There is linen on the table, silverware is present for more than the main course, and the water glasses have stems. The environment says "good job" in its uniqueness, presentation, and luxury. Your words will contradict this nonverbal message. The juxtaposition between the environment and the verbal message will cause tension and confusion, which will probably be an obstacle to the receiver's ability to listen. If Brian doesn't understand the message, and the message requires clarification, your approach has failed. The contrast between the restaurant setting and the negative message does not promote understanding and acceptance of the bad news or correction. Furthermore, it does not build trust in the relationship, as the restaurant invitation might be interpreted as a "trap" or a betrayal. Let's examine yet another approach.

Scenario 3

You've written Brian a stern e-mail. You've included a list of all the recent dates when he was late and made several statements about the quality of his work. You've indicated he needs to improve, and stop being late, or else. But was your email harassment? Could it be considered beyond the scope of supervision and interpreted as mean or cruel? And do you even know if Brian has received it? If there was no reply, do you know whether it achieved its desired business outcome? A written message may certainly be part of the desired approach, but how it is presented and delivered is as important as what it says. Let's examine our fourth approach to this scenario.

Scenario 4

You ask Brian to join you in a private conversation. You start the conversation with an expression of concern and an open-ended question: "Brian, I've been concerned about your work lately. Is everything all right?" As Brian answers, you may demonstrate that you are listening by nodding your head and possibly taking notes. You may learn that Brian has been having problems sleeping or that his living situation has changed. Or Brian may decline to share any issues, deny that anything is wrong, and ask why you are concerned. You may then state that you've observed the chronic lateness, name one or more specific mistakes you have found in his work, and end with a reiteration that you are concerned. This statement of concern may elicit more responses and open the conversation up into a dialogue where you come to understand the situation, Brian sees your concern, and the relationship is preserved. Alternatively, in case the conversation does not go well, you will still keep a positive attitude even as you document the meeting and give Brian a verbal warning.

Regardless of how well or poorly the conversation goes, if Brian tells other employees about it, they may take note of how you handled the situation, and it will contribute to their perception of you. It guides their expectations of how you operate and how to communicate with you, as this interaction is not only about you and Brian. You represent the company and its reputation, and your professional display of concern as you try to learn more sends a positive message. While the private, respectful meeting may not be the perfect solution, it is preferable to the other approaches we have considered.

One additional point to consider as you document this interaction is the need to present the warning in writing. You may elect to prepare a memo that outlines the information concerning Brian's performance and lateness and have it ready should you want to present it. If the session goes well, and you have the discretion to make a judgment call, you may elect to give him another week to resolve the issue. Even if it goes well, you may want to present the memo, as it documents the interaction and serves as evidence of due process should Brian's behaviour fail to change, eventually resulting in the need for termination.

This combined approach of a verbal and written message is increasingly the norm in business communication.

Delivering a bad news message

There are two approaches you can use to deliver a negative news message–the direct approach and the indirect approach. We'll go through each of these in turn.

Direct approach

The direct approach is often used when the audience values brevity, the message needs to be concise, the message is very complex and might not be understood easily, the message is related to a known issue or problem (and bad news won't be a surprise), or you're terminating a business relationship.

As shown in Figure 4.11.1, the bad news is announced in the opening or introduction of the message.

Your request for vacation time from August 1-30 was not approved because it is over your vacation days entitlement of 10 days.

Please re-submit your request for vacation days (up to a maximum of 10) to HR as soon as possible.

Figure 4.11.1 An example of a bad news message delivered using the direct approach

Indirect approach

When the bad news may have a significant impact on the recipient or you don't know them very well, you may prefer to use the indirect approach. Figure 4.11.2 shows an example of a bad news message delivered using this approach.

> Thank you for submitting your request for 10 days of vacation (your maximum entitlement) in August.
>
> Summer is traditionally a time when many employees are out of the office and demands on the servers are reduced. In order to minimize the disruption to staff throughout the company, the IT department will be rolling out a server replacement project during July and August. Because this project will need to be completed in a more compressed timeframe, no vacation requests in July and August are possible for staff in the IT department. As a result, your request for vacation during August has not been approved. However, you are welcome to take vacation before and/or after the project rolls out. In compensation, HR is providing IT staff with three extra days of paid vacation.
>
> We look forward to receiving your revised vacation request soon.

Figure 4.11.2 An example of a bad news message delivered using the indirect approach

The indirect approach for delivering bad news has five main parts:

1. Open with a buffer statement
2. Explain the situation
3. Break the bad news
4. Redirect or provide alternatives
5. End politely and forward-looking

We'll go through each of these parts in detail.

Buffer statement

The first part of a negative news message, verbal or written, is a buffer statement. It provides neutral or positive information. It sets the tone and often serves as a cushion for the information to come. It is important that the buffer not be overly positive because this can be misleading or set up the reader to expect a positive news message instead.

Explanation

Next, an explanation discusses why there is an issue. This may be relatively simple, quite complex, or uncomfortable. While an explanation is important, never admit or imply responsibility without written authorization from your company cleared by legal counsel. Try to avoid labeling the bad news, such as calling it inconvenient or disappointing, because this can assume the feelings of your reader and create a negative impression. The person receiving the message may not have felt badly about receiving the news until you pointed out that it was indeed inconvenient or disappointing.

Break the bad news

The third part of the negative news message involves the bad news itself, and the emphasis here is on clarity and accuracy. While you want to break the bad news clearly, try not to spotlight it.

Redirect or provide alternatives

The fourth part of a bad news message is the redirect, where you refocus attention on a solution strategy, possible alternatives, or the subsequent actions that will take place.

End politely and forward-looking

Last, you want to end your message politely and looking to the future. Don't mention the bad news again!

Reference

Bovee, C., & Thill, J. (2010). *Business communication essentials: A skills-based approach to vital business English* (4th ed.). Upper Saddle River, NJ: Prentice Hall.

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PART 6: VISUAL COMMUNICATION

6.1 Graphics

A picture is worth a thousand words, as the old saying goes. Sometimes, despite writing clearly and concisely, it can be helpful to your audience if you use supporting graphics–whether that be tables, illustrations, maps, photos, charts, or some other type of other visual aid.

Before getting into details on creating, formatting, and incorporating graphics, consider the types and their functions. You can use graphics to represent the following elements in your writing:

- **Objects** — If you're describing a fuel-injection system, you'll probably need a drawing or diagram of the thing. If you are explaining how to graft a fruit tree, you'll need some illustrations of how that task is done. Photographs, drawings, diagrams, and schematics are the types of graphics that show objects.
- **Numbers —** If you're discussing the rising cost of housing in Vancouver, you could use a table with the columns being for five-year periods since 1970; the rows could be for different types of housing. You could show the same data in the form of bar charts, pie charts, or line graphs. Tables, bar charts, pie charts, and line graphs are some of the principal ways to show numerical data.
- **Concepts** — If you want to show how your company is organized, such as the relationships of the different departments and officials, you could set up an organization chart, which is boxes and circles connected with lines showing how everything is hierarchically arranged and related. This would be an example of a graphic for a concept; this type depicts nonphysical, conceptual things and their relationships.
- **Words** — Graphics can be used to depict words. You've probably noticed how some textbooks may put key definitions in a box, maybe with different color in the background. The same can be done with key points or extended examples.

Documenting graphics

Just as you would cite and reference a paraphrase or a direct quote, so too must you cite and reference any graphics that you use that were created by someone else or that were based on someone else's data. Indicate the source of any graphic or data you have borrowed. Whenever you borrow a graphic or data from some other source, document that fact in the figure title using an in-text citation. You should also include the reference information in the reference list.

Guidelines for using graphics

Use graphics *whenever* they would normally be necessary—don't be scared because it seems like too much trouble!

Make sure your graphics are appropriate to your audience, subject matter, and purpose — don't zap beginners with advanced, highly technical graphics they can't understand.

Intersperse graphics and text on the same page. Place graphics as near to the point in the text where they are relevant as is reasonable, and don't put them on pages by themselves or attach them to the end of documents. However, if a graphic does not fit properly on one page, put it at the top of the next, and continue with regular text on the preceding page. Don't leave half a page blank just to keep a graphic near the text with which it is associated.

Always discuss graphics in nearby text preceding the graphic. Don't just throw a graphic out there unexplained. Orient readers to the graphic and explain its basic meaning. Graphics are not there for decoration! They need to have a purpose and be introduced before the reader encounters them on the page. The first mention of a graphic is called a lead-in statement, and your graphics must always be introduced by a lead-in. Similarly, it is typically recommended to also use a lead-out statement after the graphic. This is a statement that connects the figure to the material that follows.

Use titles and labels for graphics.

Include identifying detail such as illustration labels, axis labels, keys, and so on.

Make sure graphics fit within normal margins—if they don't, enlarge or reduce the copies. Leave at least 2 blank lines above and below graphics.

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6.2 Drawings, diagrams, and photos

To depict objects, place, people, and relationships between them, you can use photos, drawings, diagrams, and schematics.

In the realm of illustrations and photographs, the types run from minimal detail to maximal. A simple line drawing of how to graft a fruit tree reduces the detail to simple lines representing the hands, the tools, the graft stock, and graft. Diagrams are a more abstract, schematic view of things, such as a wiring diagram of a clock radio (which hardly resembles the actual physical thing at all). And of course photographs provide the most detail of all. These graphics, supplying gradations of detail as they do, have their varying uses.

Formatting requirements

When you use an illustration in a report, there are several requirements to keep in mind.

Just about any illustration should contain labels words and phrases with pointers to the parts of the things being depicted.

If the illustration has certain shadings, colors, line styles, or other such details that have a special meaning in the illustration, these should be indicated in a key or legend in an unused corner of the illustration.

Ideally, you should place illustrations, diagrams, and photos just after the point where they are needed. However, sometimes because of the pagination (the way the text falls on the pages) and the size of the illustrations, diagrams, or photos, this close placement is not possible. In these instances, you can put the graphic at the top of the next page.

Again, ideally, you want illustrations, diagrams, and photos to be between one-half to one-quarter of the vertical size of the page. You should fit them on the page with other text. What you do *not* want is to append the graphic to the back of the report!

Make sure that your illustrations, diagrams, and photos fit neatly and comfortably within standard margins. You don't want them spilling over into the right or left margins. You want to allow the equivalent of at least two blank lines above and below the graphic.

Illustrations, diagrams, and photos should have titles, and these titles should be numbered (Figure 1, Figure 2, and so on). The titles and figure labels should be placed below the graphic.

Illustrations, diagrams, and photos should be referred to from the relevant point in the discussion, and you should do more than just tossing in a "See Figure 2." Discuss the illustration to focus the reader's attention on the key details of the graphic.

Just as you would cite and reference a paraphrase or a direct quote, so too must you cite and reference any illustrations, diagrams, and photos that you use that were created by someone else or that were based on someone else's data. Indicate the source of any graphic or data you have borrowed. Whenever you borrow a graphic or data from some other source, document that fact in the figure title using an in-text citation. You should also include the reference information in the reference list.

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6.3 Tables, charts, and graphs

Tables

Uses for tables

Tables are rows and columns of numbers and words (though mostly numbers). They permit rapid access to and relatively easy comparison of information. If the data is arranged chronologically (for example, sales figures over a ten-year period), the table can show trends—patterns of rising or falling activity. However, tables are not necessarily the most vivid or dramatic means of showing such trends or relationships between data—for that, you'd want to use a line graph, which is discussed in the next section.

The biggest use of tables is for numerical data. Imagine that you are comparing different models of laser printers in terms of physical characteristics such as height, depth, length, weight, and so on. This type of data is perfect for a table.

A special type of table is called a matrix. This is where instead of comparing numerical values in the rows and columns, you are comparing qualitative data (words). For example, imagine that you were comparing several models of a laser printer and you want to represent various information, such as cost, print speed, supply costs, and warranty terms, for each printer being considered. This is ideal information for a matrix, and it would be mostly words rather than numbers.

Formatting requirements

In its simplest form, a table is a group of rows and columns of data. At the top of each column is a column heading, which defines or identifies the contents of that column (and often it indicates the unit of measurement). On the left edge of the table are row headings, which define or identify the contents of that row. Things can get tricky when rows or columns must be grouped or subdivided. In such cases, you have to create row or column subheadings, as shown in Figure 5.3.1.

Table 3. Energy production by major source from 1960 to 1980[1]

Year	Total production (quad Btu)	Percent production			
		Coal	Petroleum	Natural gas	Other[2]
1960	41.5	26.1	36.0	34.0	3.9
1970	62.1	23.5	32.9	38.9	4.7
1980	64.8	28.7	28.2	34.2	8.9

[1] *Source:* U.S. Energy Information Administration, *Annual Energy Review*

[2] Includes hydropower, nuclear power, geothermal power, and others.

Figure 5.3.1 Format for tables with grouped or subdivided rows and columns.

As you can see, the title and number for the table goes *above* the table. This is in contrast to other types of graphics where the title and number go *below* the graphic.

Guidelines for using tables

As with other types of graphics, you should refer to the table in the text just preceding the table. You should also explain the general significance of the data in the table; don't expect readers to figure it out entirely for themselves.

Don't overwhelm readers with monster 11-column, 30-row tables! Simplify the table data down to just that amount of data that illustrates your point—without of course distorting that data.

Don't put the word or abbreviation for the unit of measurement in every cell of a column. For example, in a column of measurements all in millimeters, don't put "mm" after every number. Put the abbreviation in parentheses in the column or row heading.

Right- or decimal-align numbers in the columns. If the 123 and 4 were in a column, the 4 would be right below the 3, not the 1.

Normally, words in columns are left-justified (although you will occasionally see columns of words all centered).

Column headings are centered over the columns of numerical data (forming a T-shape). When the table contains text rather than numbers, the column headings are left-aligned.

Just as you would cite and reference a paraphrase or a direct quote, so too must you cite and reference any tables that you use that were created by someone else or that were based on someone else's data. Indicate the source of any graphic or data you have borrowed. Whenever you borrow a graphic or data from some other source, document that fact in the figure title using an in-text citation. You should also include the reference information in the reference list.

Charts and graphs

Uses of charts and graphs

Charts and graphs are just another way of presenting the same data that is presented in tables. At the same time, however, you get less detail or less precision in a chart or graph than you do in the table. Imagine the difference between a table of sales figures for a ten-year period and a line graph for that same data. You get a better sense of the overall trend in the graph but not the precise dollar amount. Other types of charts and graphs are horizontal bar charts, vertical bar charts, and pie charts.

Formatting requirements

In bar charts and line graphs, don't forget to indicate what the x and y axes represent. One axis might indicate millions of dollars; the other, five-year segments from 1960 to the present.

Bar charts, line graphs, and pie charts often use special colour, shading, or line style (solid or dashed). Be sure to indicate what these mean; translate them in a key (a legend) in some unused place in the chart or graph.

Include a title and numbered label for your charts and graphs. Include the title and label below the graphic, as shown in Figure 5.3.2.

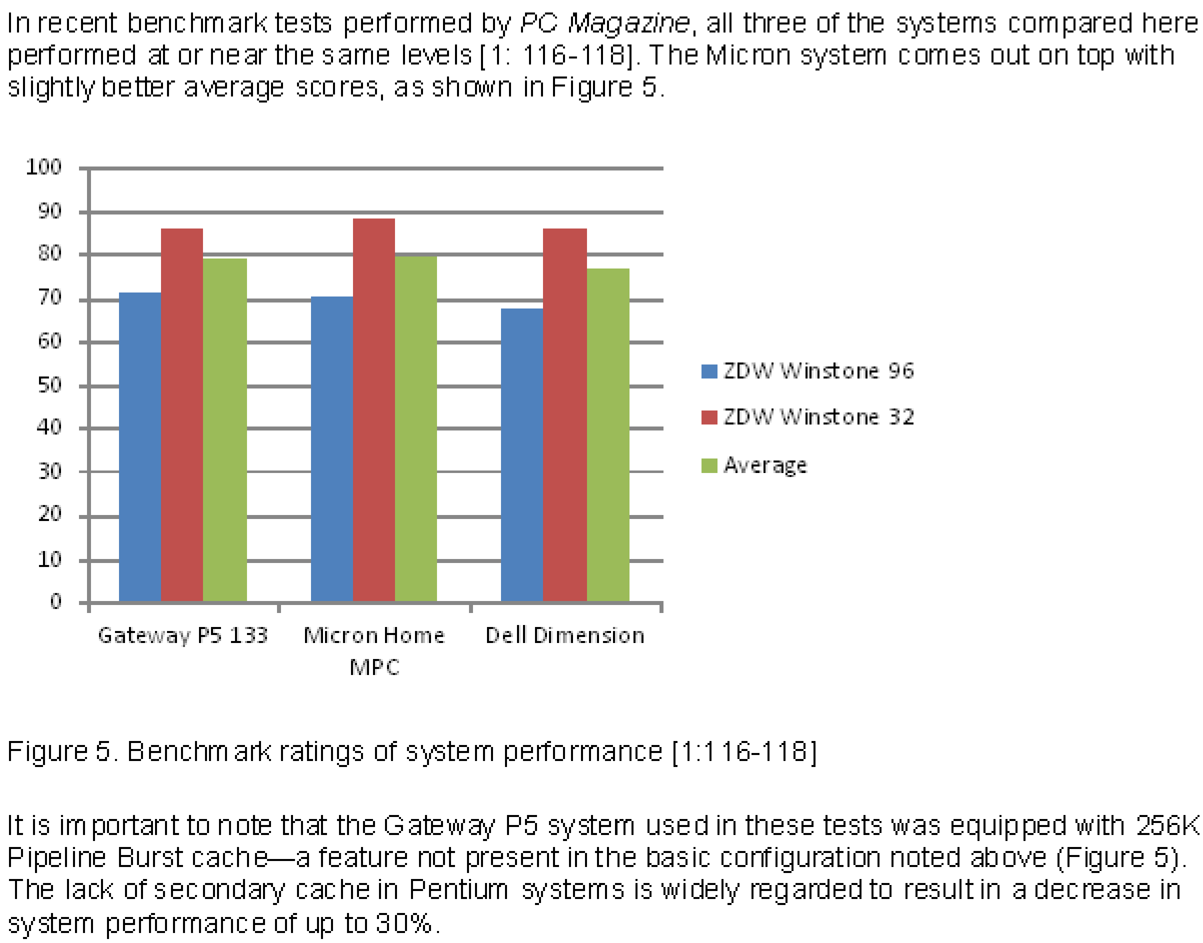
In recent benchmark tests performed by *PC Magazine*, all three of the systems compared here performed at or near the same levels [1: 116-118]. The Micron system comes out on top with slightly better average scores, as shown in Figure 5.

Figure 5. Benchmark ratings of system performance [1:116-118]

It is important to note that the Gateway P5 system used in these tests was equipped with 256K Pipeline Burst cache—a feature not present in the basic configuration noted above (Figure 5). The lack of secondary cache in Pentium systems is widely regarded to result in a decrease in system performance of up to 30%.

Figure 5.3.2 Example of a chart

As you can see, there is text above and below the chart that calls attention to the graphic and briefly indicates its significance.

Just as you would cite and reference a paraphrase or a direct quote, so too must you cite and reference any charts or graphs that you use that were created by someone else or that were based on someone else's data. Indicate the source of any graphic or data you have borrowed. Whenever you borrow a graphic or data from some other source, document that fact in the figure title using an in-text citation. You should also include the reference information in the reference list.

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6.4 Headings

Headings are the titles and subtitles you see within the actual text of much professional scientific, technical, and business writing. Headings are like the parts of an outline that have been pasted into the actual pages of the document.

Headings are an important feature of professional technical writing. They alert readers to upcoming topics and subtopics, help readers find their way around in long reports and skip what they are not interested in, and break up long stretches of straight text.

Headings are also useful for writers. They keep you organized and focused on the topic. When you begin using headings, your impulse may be to slap in the headings *after* you've written the rough draft. Instead, visualize the headings *before* you start the rough draft, and plug them in as you write.

General guidelines

Use headings to mark off the boundaries of the major sections and subsections of a report.

Make the phrasing of headings parallel.

Avoid "stacked" headings—any two consecutive headings without intervening text.

When possible, omit articles from the beginning of headings. For example, "The Pressurized Water Reactor" can easily be changed to "Pressurized Water Reactor" or, better yet, "Pressurized Water Reactors."

Don't use headings as lead-ins to lists or as figure titles.

Avoid "widowed" headings; that's where a heading occurs at the bottom of a page and the text it introduces starts at the top of the next page. Keep at least two lines of body text with the heading, or force it to start the new page.

Format and style

The style and format for headings shown in this chapter is not the "right" or the "only" one; it is just one among many.

As illustrated in Figure 5.4.1, headings function like outline elements inserted into the text at those points where they apply

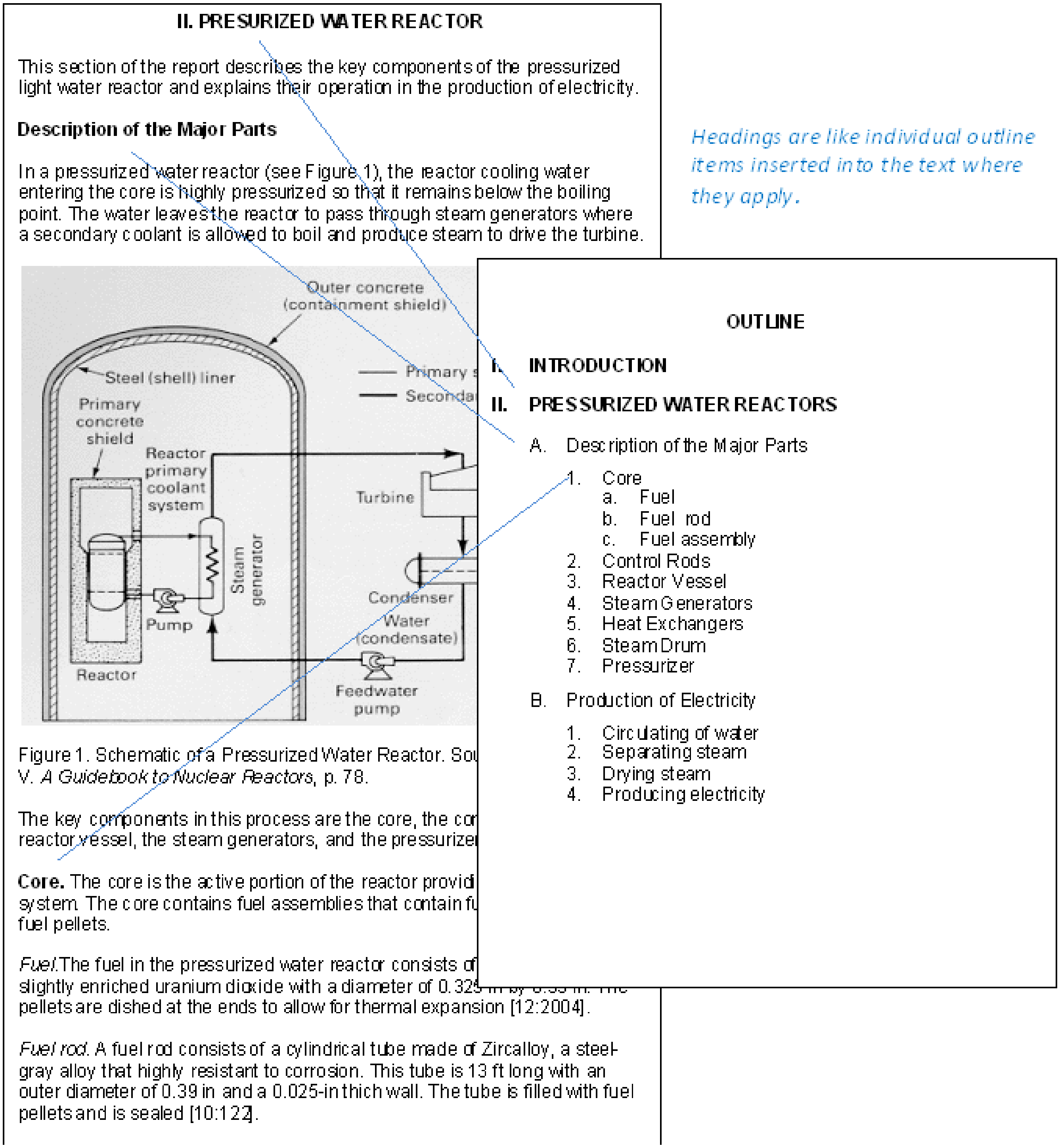

Figure 5.4.1 Comparing document headings to an outline

When formatting your headings and subheadings, pay close attention to details such as vertical and horizontal spacing; capitalization; use of bold, italics, or underlining; and punctuation.

Headings occur within the body of a document. Don't confuse headings with document titles. Although titles may look like first-level headings in smaller documents, think of them as separate things.

First-level headings are the highest level of headings in your document. Apply the same format or style to all first-level headings. This style should be different from that which is applied to second-level heading. All second-level headings should have the same style. Similarly, this style should be different from that which is applied to third-level headings (and all third-level headings should have the same style), and so on. There are different ways and styles you can use to differentiate various levels of headings. Use whatever styles are appropriate for the document and audience.

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6.5 Lists

Lists are useful because they emphasize selected information in regular text.

Lists can be horizontal, with the listed items included directly in the sentence/paragraph. Lists can be vertical, such as when you see a list of three or four items strung out vertically on the page rather than in normal paragraph format. Lists–particularly vertical lists–are noticeable and readers are likely to pay more attention to them. Certain types of lists also make for easier reading. For example, in instructions, it is a big help for each step to be numbered and separate from the preceding and following steps. Lists also create more white space and spread out the text so that pages don't seem like solid walls of words.

Like headings, the various types of lists are an important feature of professional writing. They help readers understand, remember, and review key points. They help readers follow a sequence of actions or events. They also break up long stretches of straight text.

General guidelines

Use lists to highlight or emphasize text or to enumerate sequential items.

Use a lead-in to introduce the list items and to indicate the meaning or purpose of the list.

Make sure that each item in the list reads grammatically with the lead-in.

Make list items parallel in phrasing.

Avoid overusing lists because using too many lists destroys their effectiveness.

Bullet points are democratic, meaning each item in a bulleted list is of equal importance. This is in contrast to numbered lists where items may have different levels of importance, priority, or sequence. Use bulleted lists for items that are in no required order. Use numbered lists for items that are in a required order (such as step-by-step instructions) or for items that must be referred to by item number.

Horizontal lists

Use a colon to introduce the list items *only* if a complete sentence precedes the list. Omit the colon if the lead-in is not a complete sentence.

Incorrect: For this project, you need: tape, scissors, and white-out.

Correct: For this project, you need tape, scissors, and white-out.

Use both opening and closing parentheses on the list item numbers or letters: (a) item, (b) item, etc. (Don't just use one parenthesis.) Use either regular numbers or lowercase letters within the parentheses, but use them consistently. (Do not punctuate either with periods.)

Use lowercase for the text of in-sentence lists items, except when regular capitalization rules require caps.

Punctuate the horizontal list items with commas if they are not complete sentences. Use semicolons if they are complete sentences.

Incorrect: Follow these instructions to get to the store from your home: (1) drive south for three blocks, (2) turn right, (3) drive west for 6 blocks, (4) turn left, (5) drive for half a block, (6) turn right into the parking lot.

Correct: Follow these instructions to get to the store from your home: (1) drive south for three blocks; (2) turn right; (3) drive west for 6 blocks; (4) turn left; (5) drive for half a block; (6) turn right into the parking lot.

Use the same spacing for horizontal lists as in regular non-list text.

Make the horizontal list occur at the end of the sentence. Never place a horizontal list introduced by a colon anywhere but at the end of the sentence!

Incorrect: The following items: tape, scissors, and white-out are needed for this project.

Correct: The following items are needed for this project: tape, scissors, and white-out.

Vertical lists

Introduce the list with a lead-in phrase or clause. Use a colon to introduce the list items *only* if the lead-in is a complete sentence. Omit the colon if the lead-in is an incomplete sentence.

Avoid using headings as lead-ins for lists.

Use consistent spacing, indentation, and punctuation.

When a separate notice or explanatory paragraph follows a item, indent that separate material to the text of the parent list item, as illustrated in Figure 5.5.1.

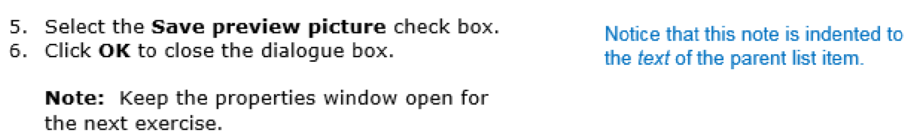

Figure 5.5.1 Indented material that elaborates on the parent list item

Use the "hanging indent" format for list items two or more lines long.

Use sentence-style capitalization on list items.

Punctuate list items only if they are complete sentences that complete the sentence begun by the lead-in.

When possible, omit articles (*a*, *an*, *the*) from the beginning of non-sentence list items.

A word of caution

If your list contains more than 6-8 items, you might consider consolidating list items or re-formatting your list. Lists with too many items can be overwhelming and challenging to read.

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6.6 Emphasis

Emphasis, as the term is used here, is the use of typographical effects to call attention to text. These effects can include italics, bold, all-caps, quotation marks, color, and so on. Emphasis attracts the attention of the reader—or "cues" them—to actions they must take or to information they must consider carefully.

Practically any special textual effect that is different from regular body text can function as an emphasis technique. Things like italics, bold, underscores, caps, different size type, alternate fonts, colour, and more can act as emphasis techniques.

However, if emphasis techniques are used in excess, readers can become reluctant to read a text and may avoid it altogether because it is too busy or distracting. ***NOTICE HOW UNREADABLE THIS SENTENCE IS BECAUSE TOO MUCH EMPHASIS IS USED.*** When it comes to emphasis, there can be too much of a good thing! Emphasis techniques must be used strategically and consistently.

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PART 7: POLISHING YOUR MESSAGE

7.1 Revising, editing, and proofreading

After you have written a draft of your message, you will need to make changes. While you may feel that you write best "under pressure" the night before your assignment is due or in the minutes before sending an email at work, writing a single draft at the last minute rarely results in anyone's best work. You may feel that you've put a lot of effort into your first draft, so it can be challenging to think about changing your work or even eliminating words that you toiled over. However, it's well worth the pain of revising, editing, and proofreading so you produce a polished piece of writing that others can easily understand.

To revise a piece of writing, it may help you to consider three approaches: look at the big picture, check your organization, and proofread your final draft.

Higher order concerns

Revising for higher order concerns means working on the organization of your ideas. You might insert sentences, words, or paragraphs; you might move them elsewhere in your document; or you might remove them entirely (Meyer, 2017).

When you revise at the "big picture" stage, you are looking at the most important aspects of the writing tasks, and the ones that require the most thought. Here's a set of questions to help you revise for these higher order concerns:

- Have I met the purpose and requirements?
- Does my draft say what I mean?
- Have I changed my thinking through writing or researching?
- Are there parts that do not belong here?
- Are there pieces missing?
- Are there places where the writing does not make sense?
- Is the tone right for my reader?
- Are my sources the right kind for my purpose and reader?
- Are all the pieces in the right place?
- Are sources documented?

Another way to edit for higher order concerns is to prepare a reverse outline using your draft. This technique is discussed in the next chapter.

Lower order concerns

Lower order concerns focus on editing and proofreading. When you edit, you work from your revised draft to systematically correct issues or errors in punctuation, grammar, spelling, and other things related to writing mechanics (Meyer, 2017). Proofreading is the last stage where you work from your almost-finished document to fix any issues or errors in formatting or typos you missed (Meyer, 2017). Here's another way of distinguishing these two tasks. Editing is the act of making changes or indicating what to change; proofreading means checking to make sure those changes were made.

Perhaps you are the person who proofreads and edits as you write a draft, so when you are done drafting and revising for content and structure, you may not have that much editing or proofreading to do. Or maybe you are the person who pays no attention to grammar and spelling as you draft, saving all of the editing until you are finished writing. Either way, plan to carefully edit and proofread your work. For most people, proofreading on a printed copy is more effective than working entirely on screen.

Here are some additional strategies for editing and proofreading your work:

- Take a break between writing and editing. Even a 15 minute break can help you look at your document anew.
- Read your work aloud.
- Work through your document slowly, moving word by word.
- Start at the end of your document and work towards the beginning.
- Focus on one issue at a time. Trying to look for spelling errors, punctuation issues, awkward phrasing, and more all at once can make it easier to miss items needing correction.
- Don't rely exclusively on spelling- or grammar-checking software. (This poem was run through such a program and no problems were detected!)
- Review through your document several times.

References

Meyer, C. (2017). *Communicating for results: A Canadian student's guide* (4th ed.). Don Mills, Canada: Oxford University Press.

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7.2 Reverse outlining

Often, outlining is recommended as an early component of the writing process as a way to organize and connect thoughts so the shape of what you are going to write is clear before you start drafting it. This is a tool many writers use that is probably already familiar to you.

Reverse outlining, though, is different in a few ways. First, it happens later in the process, after a draft is completed rather than before. Second, it gives you an opportunity to review and assess the ideas and connections that are actually present in the completed draft. This is almost an opposite approach from traditional outlining, which considers an initial set of ideas that might shift as the draft is written and new ideas are added or existing ones are moved, changed, or removed entirely. A reverse outline can help you improve the structure and organization of your already-written draft, letting you see where support is missing for a specific point or where ideas don't quite connect on the page as clearly as you wanted them to.

How to create a reverse outline

1. At the top of a fresh sheet of paper, write your primary purpose for the text you want to outline. This should be the purpose exactly as it appears in your draft, not the purpose you know you intended. If you can't find the actual words, write down that you can't find them in this draft of the message—it's an important note to make!
2. Draw a line down the middle of the page, creating two columns below your message purpose.
3. Read, preferably out loud, the first body paragraph of your draft.
4. In the left column, write the single main idea of that paragraph (again, this should be using only the words that are actually on the page, not the ones you want to be on the page). If you find more than one main idea in a paragraph, write down all of them. If you can't find a main idea, write that down, too.
5. In the right column, state how the main idea of that paragraph supports the purpose.
6. Repeat steps 3-5 for each body paragraph of the draft.

Once you have completed these steps, you have a reverse outline! It might look a little something like the reverse outline shown in Figure 6.2.1.

Thesis: Katniss Everdeen, the heroine of The Hunger Games, creates as much danger for herself as she faces from others over the course of the film.

Main idea	How it supports the thesis
Body #1: She volunteers to fight in the games.	This is the root of most of the immediate danger she finds herself in, so her directly volunteering to do it definitely helped put her in font of that danger.
Body #2: Shooting the apple out of the pig's mouth.	This draws more attention to her and essentially puts a target on her back the other tributes will very much want to hit.

Figure 6.2.1 An example of a reverse outline

Working with the results of your reverse outline

Now what? You've probably already made some observations while completing this. Do you notice places where you are repeating yourself in your message? Do you notice places where some of your paragraphs have too many points or don't clearly support the purpose of the message?

There are a number of observations that can be made with the aid of a reverse outline, and a number of ways it can help you strengthen your messages.

If multiple paragraphs share the same idea

You might try combining them, paring back the information for that specific idea so it doesn't feel imbalanced in how much space it takes up, and/or organizing these paragraphs about the same point so they are next to each other in the paper.

If any paragraphs have multiple main ideas

Each paragraph should have only one primary focus. If you notice a paragraph does have more than one main idea, you could look for where some of those ideas might be discussed in other paragraphs and move them into a paragraph already focusing on that point. You could also select just the one main idea you think is most important to this paragraph and cut the other points out. Another option would be to split that paragraph into multiple paragraphs and expand on each main idea.

If any paragraph lacks a clear main idea

If it was hard for you to find the main idea of a paragraph, it will also be hard for your reader to find. For paragraphs that don't yet have a main idea, consider whether the information in that paragraph points to a main idea that just isn't written on the page yet. If the information does all support one main idea, adding that idea to the paragraph might be all that is needed. Alternatively, you may find that some of the ideas fit into other paragraphs to support their ideas, or you may not need some of them in the next draft at all.

If any ideas don't connect well to the purpose of the message

It should be clear how the main idea of each paragraph supports the purpose of the message. If that connection is not clear, ask yourself how the main idea of that paragraph does further your purpose and then write that response.

If there are gaps in reasoning

If a message starts out introducing something that is a problem in a community, then presents a solution to the problem, and then talks about why the problem is a problem, this organization is likely to confuse readers. Reorganizing to introduce the problem, discuss why it is a problem, and then move on to proposing a solution would do good work to help strengthen the next draft of this paper. If there are gaps in reasoning, you may need to move, revise, or add transition statements after moving paragraphs around.

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This chapter contains material taken from "Reverse outlining" in The Word on College Reading and Writing by

PART 8: INTERPERSONAL COMMUNICATIONS

8.1 Intercultural communication

We may be tempted to think of intercultural communication as interaction between two people from different countries. While two distinct national passports communicate a key part of our identity non-verbally, what happens when two people from two different parts of the same country communicate? Indeed, intercultural communication happens between subgroups of the same country. Whether it be the distinctions between dialects in the same language, the differences in perspective between an Eastern Canadian and a Western Canadian, or the rural- versus-urban dynamic, our geographic, linguistic, educational, sociological, and psychological traits influence our communication.

Culture is part of the very fabric of our thought, and we cannot separate ourselves from it, even as we leave home and begin to define ourselves in new ways through work and achievements. Every business or organization has a culture, and within what may be considered a global culture, there are many subcultures or co-cultures. For example, consider the difference between the sales and accounting departments in a corporation. We can quickly see two distinct groups with their own symbols, vocabulary, and values. Within each group there may also be smaller groups, and each member of each department comes from a distinct background that in itself influences behaviour and interaction.

Suppose we have a group of students who are all similar in age and educational level. Do gender and the societal expectations of roles influence interaction? Of course! There will be differences on multiple levels.

More than just the clothes we wear, the movies we watch, or the video games we play, all representations of our environment are part of our culture. Culture also involves the psychological aspects and behaviours that are expected of members of our group. From the choice of words (message), to how we communicate (in person or by e-mail), to how we acknowledge understanding with a nod or a glance (non-verbal feedback), to the internal and external interference, all aspects of communication are influenced by culture.

Defining culture

Culture consists of the shared beliefs, values, and assumptions of a group of people who learn from one another and teach to others that their behaviours, attitudes, and perspectives are the correct ways to think, act, and feel.

It is helpful to think about culture in the following five ways:

- Culture is learned.
- Culture is shared.
- Culture is dynamic.
- Culture is systemic.
- Culture is symbolic.

The iceberg (shown in Figure 7.5.1), is a commonly used metaphor to describe culture and is great for illustrating the tangible and the intangible. When talking about culture, most people focus on the “tip of the iceberg,” which is visible but makes up just 10 percent of the object. The rest of the iceberg, 90 percent of it, is below the waterline.

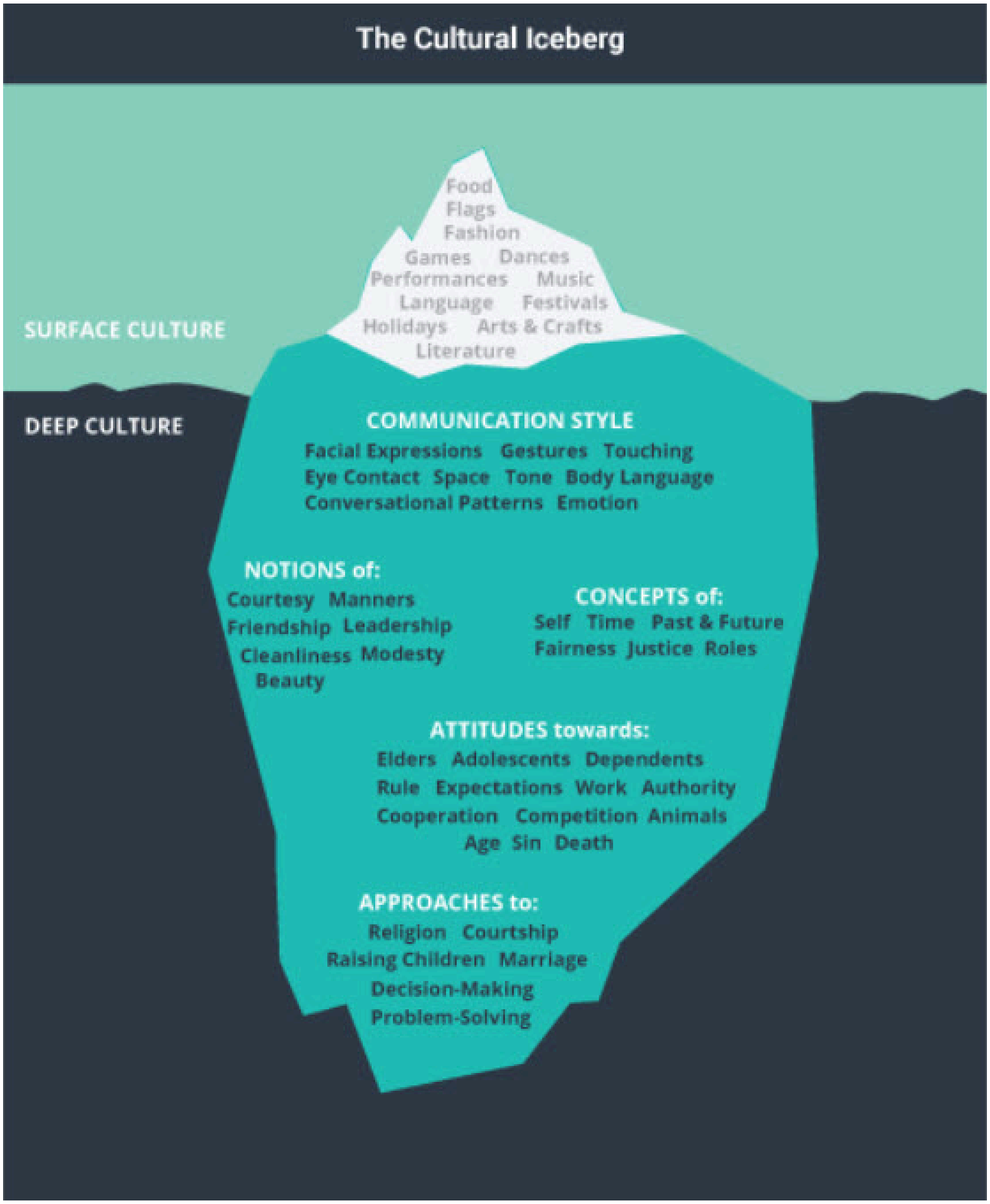

Figure 7.51 The cultural iceberg (by Laura Underwood), adapted from Lindner (2013)

Many business leaders, when addressing intercultural situations, pick up on the things they can see—things on the "tip of the iceberg." Things like food, clothing, and language difference are easily and immediately obvious, but focusing only on these can mean missing or overlooking deeper cultural aspects such as thought patterns, values, and beliefs that are under the surface. Solutions to any interpersonal miscommunication that results become temporary bandages covering deeply rooted conflicts.

Multicultural, cross-cultural, and intercultural communication

Although they are often used interchangeably, it is important to note the distinctions between the terms multicultural, cross-cultural, and intercultural communication.

Multiculturalism is a rather surface approach to the coexistence and tolerance of different cultures. It takes the perspective of "us and the others" and typically focuses on those tip-of-the-iceberg features of culture, thus highlighting and accepting some differences but maintaining a "safe" distance. If you have a multicultural day at work, for example, it usually will feature some food, dance, dress, or maybe learning about how to say a few words or greetings in a sampling of cultures.

Cross-cultural approaches typically go a bit deeper, the goal being to be more diplomatic or sensitive. They account for some interaction and recognition of difference through trade and cooperation, which builds some limited understanding—such as, for instance, bowing instead of shaking hands, or giving small but meaningful gifts. A common drawback of cross-cultural comparisons is that we can wade into stereotyping and ethnocentric attitudes—judging other cultures by our own cultural standards—if we aren't mindful.

Lastly, when we look at **intercultural** approaches, we are well beneath the surface of the iceberg, intentionally making efforts to better understand other cultures as well as ourselves. An intercultural approach is not easy and is often messy, but when you get it right, it is usually far more rewarding than the other two approaches. The intercultural approach is difficult and effective for the same reasons; it acknowledges complexity and aims to work through it to a positive, inclusive, and equitable outcome.

Whenever we encounter someone, we notice similarities and differences. While both are important, it is often the differences that contribute to communication troubles. We don't see similarities and differences only on an individual level. In fact, we also place people into in-groups and out-groups based on the similarities and differences we perceive. We tend to react to someone we perceive as a member of an out-group based on the characteristics we attach to the group rather than the individual (Allen, 2010). In these situations, it is more likely that stereotypes and prejudice will influence our communication. This division of people into opposing groups has been the source of great conflict around the world, and learning about difference and why it matters will help us be more competent communicators and help to prevent conflict.

Theories of cross-cultural communication

Hofstede

Social psychologist Geert Hofstede (Hofstede, 1982, 2001, 2005) is one of the most well-known researchers in cross-cultural communication and management. Hofstede's theory places cultural dimensions on a continuum that range from high to low and really only make sense when the elements are compared to another culture. Hofstede's dimensions include the following:

- **Power distance**: High power distance means a culture accepts and expects a great deal of hierarchy; low power distance means the president and janitor could be on the same level.
- **Individualism**: High individualism means that a culture tends to put individual needs ahead of group or collective needs.
- **Uncertainty avoidance**: High uncertainty avoidance means a culture tends to go to some lengths to be able to predict and control the future. Low uncertainty avoidance means the culture is more relaxed about the future, which sometimes shows in being willing to take risks.

- **Masculinity**: High masculinity relates to a society valuing traits that were traditionally considered masculine, such as competition, aggressiveness, and achievement. A low masculinity score demonstrates traits that were traditionally considered feminine, such as cooperation, caring, and quality of life.
- **Long-term orientation**: High long-term orientation means a culture tends to take a long- term, sometimes multi-generational view when making decisions about the present and the future. Low long-term orientation is often demonstrated in cultures that want quick results and that tend to spend instead of save.
- **Indulgence**: High indulgence means cultures that are okay with people indulging their desires and impulses. Low indulgence or restraint-based cultures value people who control or suppress desires and impulses.

These tools can provide wonderful general insight into making sense of understanding differences and similarities across key below-the-surface cross-cultural elements, but remember that people are still individuals and may or may not conform to what's listed in the tools.

Trompenaars

Fons Trompenaars is another researcher who came up with a different set of cross-cultural measures. These are his seven dimensions of culture (The seven dimensions of culture, n.d.):

- **Universalism vs. particularism**: the extent that a culture is more prone to apply rules and laws as a way of ensuring fairness, in contrast to a culture that looks at the specifics of context and looks at who is involved, to ensure fairness. The former puts the task first; the latter puts the relationship first.
- **Individualism vs. communitarianism**: the extent that people prioritize individual interests versus the community's interest.
- **Specific vs. diffuse**: the extent that a culture prioritizes a head-down, task-focused approach to doing work, versus an inclusive, overlapping relationship between life and work.
- **Neutral vs. emotional**: the extent that a culture works to avoid showing emotion versus a culture that values a display or expression of emotions.
- **Achievement vs. ascription**: the degree to which a culture values earned achievement in what you do versus ascribed qualities related to who you are based on elements like title, lineage, or position.
- **Sequential time vs. synchronous time**: the degree to which a culture prefers doing things one at time in an orderly fashion versus preferring a more flexible approach to time with the ability to do many things at once.
- **Internal direction vs. outer direction**: the degree to which members of a culture believe they have control over themselves and their environment versus being more conscious of how they need to conform to the external environment.

Like Hofstede's work, Trompenaars' dimensions help us understand some of those beneath-the-surface-of-the-iceberg elements of culture. It's equally important to understand our own cultures as it is to look at others, always being mindful that our cultures, as well as others, are made up of individuals.

High context and low context cultures

High context cultures are replete with implied meanings beyond the words on the surface and even body language that may not be obvious to people unfamiliar with the context. Low context cultures are typically more direct and tend to use words to attempt to convey precise meaning.

For example, an agreement in a high context culture might be verbal because the parties know each other's families, histories, and social position. This knowledge is sufficient for the agreement to be enforced. No one actually has to say, "I know where you live. If you don't hold up your end of the bargain, …" because the shared understanding is implied and highly contextual. A low context culture usually requires highly detailed, written agreements that are signed by both parties, sometimes mediated through specialists like lawyers, as a way to enforce the agreement. This is low context because the written agreement spells out all the details so that not much is left to the imagination or "context."

Working with others

How can you prepare to work with people from cultures different than your own? Start by doing your homework. Let's assume that you have a group of Japanese colleagues visiting your office next week. How could you prepare for their visit? If you're not already familiar with the history and culture of Japan, this is a good time to do some reading or a little bit of research online. If you can find a few English-language publications from Japan (such as newspapers and magazines), you may wish to read through them to become familiar with current events and gain some insight into the written communication style used.

Preparing this way will help you to avoid mentioning sensitive topics and to show correct etiquette to your guests. For example, Japanese culture values modesty, politeness, and punctuality, so with this information, you can make sure you are early for appointments and do not monopolize conversations by talking about yourself and your achievements. You should also find out what faux pas to avoid. For example, in company of Japanese people, it is customary to pour others' drinks (another person at the table will pour yours). Also, make sure you do not put your chopsticks vertically in a bowl of rice, as this is considered rude. If you have not used chopsticks before and you expect to eat Japanese food with your colleagues, it would be a nice gesture to make an effort to learn. Similarly, learning a few words of the language (e.g., hello, nice to meet you, thank you, and goodbye) will show your guests that you are interested in their culture and are willing to make the effort to communicate.

If you have a colleague who has traveled to Japan or has spent time in the company of Japanese colleagues before, ask them about their experience so that you can prepare. What mistakes should you avoid? How should you address and greet your colleagues? Knowing the answers to these questions will make you feel more confident when the time comes. But most of all, remember that a little goes a long way. Your guests will appreciate your efforts to make them feel welcome and comfortable. People are, for the most part, kind and understanding, so if you make some mistakes along the way, be kind to yourself. Reflect on what happened, learn from it, and move on. Most people are keen to share their culture with others, so your guests will be happy to explain various practices to you.

Improving your intercultural competence

One helpful way to develop your intercultural communication competence is to develop sensitivity to intercultural communication issues and best practices. From everything we have learned so far, it may feel complex and overwhelming. The Intercultural Development Continuum is a theory created by Mitchell Hammer (2012) that helps demystify the process of moving from monocultural approaches to intercultural approaches. There are five steps in this transition:

1. Denial: Denial is the problem-denying stage. For example, a well-meaning person might say that they pay no attention to race issues because they themselves are “colour blind” and treat everyone the same, irrespective of race. While on the surface this attitude seems fair-minded, it can mean willfully blinding oneself to very real cultural differences. Essentially, not much sensitivity or empathy can be present if one denies that cultural differences actually exist. This is a monocultural mindset. When there’s denial in organizations, diversity feels *ignored*.

2. Polarization: Polarization is the stage where one accepts and acknowledges that there is such a thing as cultural difference, but the difference is framed as a negative “us versus them” proposition. This usually means “we” are the good guys, and “they” are the bad guys. Sometimes a person will reverse this approach and say their own culture is bad or otherwise deficient and see a different culture as superior or very good. Either way, polarization reinforces already-existing biases and stereotypes and misses out on nuanced understanding and empathy. It is thus considered more of a monocultural mindset. When polarization exists in organizations, diversity usually feels *uncomfortable*.

3. Minimization: Minimization is a hybrid category that is really neither monocultural nor intercultural. Minimization recognizes that there are cultural differences, even significant ones, but tends to focus on universal commonalities that can mask or paper over other important cultural distinctions. This is typically characterized by limited cultural self-awareness in the case of a person belonging to a dominant culture, or as a strategy by members of non-dominant groups to “go along to get along” in an organization. When dominant culture minimization exists in organizations, diversity feels *not heard*.

4. Acceptance: Acceptance demonstrates a recognition and deeper appreciation of both their own and others’ cultural differences and commonalities and is the first dimension that exhibits a more intercultural mindset. At this level, people are better able to detect cultural patterns and able to see how those patterns make sense in their own and other cultural contexts. There is the capacity to accept others as being different and at the same time being fully human. When there is acceptance in organizations, diversity feels *understood*.

5. Adaptation: Adaptation is characterized by an ability not only to recognize different cultural patterns in oneself and other cultures but also to effectively adapt one’s mindset or behaviour to suit the cultural context in an authentic way. When there is adaptation in organizations, diversity feels *valued and involved*.

The first two steps out of five reflect monocultural mindsets. According to Hammer (2009), people who belong to dominant cultural groups in a given society or people who have had very little exposure to other cultures may be more likely to have a worldview that’s more monocultural. But how does this cause problems in interpersonal communication? For one, being blind to the cultural differences of the person you want to communicate with (denial) increases the likelihood that you will encode a message that they won’t decode the way you anticipate, or vice versa.

For example, let’s say culture A considers the head a special and sacred part of the body that others should never touch, certainly not strangers or mere acquaintances. But let’s say in your culture, people sometimes pat each other on the head as a sign of respect and caring. So you pat your culture A colleague on the head, and this act sets off a huge conflict.

It would take a great deal of careful communication to sort out such a misunderstanding, but if each party keeps judging the other by their own cultural standards, it’s likely that additional misunderstanding, conflict, and poor communication will transpire.

Using this example, polarization can come into play because now there’s a basis of experience for selective perception of the other culture. Culture A might say that your culture is disrespectful, lacks proper morals, and values, and it might support these claims with anecdotal evidence of people from your culture patting one another on the sacred head!

Meanwhile, your culture will say that culture A is bad-tempered, unintelligent, and angry by nature and that there would be no point in even trying to respect or explain things them.

It’s a simple example, but over time and history, situations like this have mounted and thus led to violence, war, and genocide.

According to Hammer (2009), the majority of people who have taken the IDI inventory, a 50- question questionnaire to determine where they are on the monocultural–intercultural continuum, fall in the category of minimization, which is neither monocultural nor intercultural. It's the middle-of-the-road category that on one hand recognizes cultural difference but on the other hand simultaneously downplays it. While not as extreme as the first two situations, interpersonal communication with someone of a different culture can also be difficult here because of the same encoding/decoding issues that can lead to inaccurate perceptions. On the positive side, the recognition of cultural differences provides a foundation on which to build and a point from which to move toward acceptance, which is an intercultural mindset.

There are fewer people in the acceptance category than there are in the minimization category, and only a small percentage of people fall into the adaptation category. This means most of us have our work cut out for us if we recognize the value—considering our increasingly global societies and economies—of developing an intercultural mindset as a way to improve our interpersonal communication skill.

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Attribution

8.2 Team work

It is highly likely you will have to work in a team at some point in your career. Being able to work with others effectively is an essential skill to have in today's workplace.

Small groups have to start somewhere. Even established groups go through changes as members come and go, as tasks are started and completed, and as relationships change. In this section, we will learn about the stages of group development, which are forming, storming, norming, performing, and adjourning (Tuckman & Jensen, 1977). As with most models of communication phenomena, although we order the stages and discuss them separately, they are not always experienced in a linear fashion. Additionally, some groups don't experience all five stages, may experience stages multiple times, or may experience more than one stage at a time.

Forming

During the forming stage, group members begin to reduce uncertainty associated with new relationships and/or new tasks through initial interactions that lay the foundation for later group dynamics. Groups return to the forming stage as group members come and go over the life span of a group. Although there may not be as much uncertainty when one or two new people join a group as there is when a group first forms, groups spend some time in the forming stage every time group membership changes.

Given that interpersonal bonds are likely not yet formed and people are unfamiliar with the purpose of the group or task at hand, there are high levels of uncertainty in the group. Early stages of role negotiation begin and members begin to determine goals for the group and establish rules and norms. Group cohesion also begins to form during this stage. Group cohesion refers to the commitment of members to the purpose of the group and the degree of attraction among individuals within the group (Hargie, 2011). The cohesion that begins in this stage sets the group on a trajectory influenced by group members' feelings about one another and their purpose or task. Groups with voluntary membership may exhibit high levels of optimism about what the group can accomplish. Although the optimism can be motivating, unrealistic expectations can lead to disappointment, making it important for group members to balance optimism with realism. Groups with assigned or mandatory membership may include members that carry some degree of resentment toward the group itself or the goals of the group. These members can start the group off on a negative trajectory that will lessen or make difficult group cohesiveness. Groups can still be successful if these members are balanced out by others who are more committed to and positive in regards to the purpose of the group.

Many factors influence how the forming stage of group development plays out. The personalities of the individuals in the group, the skills that members bring, the resources available to the group, the group's size, and the group's charge all contribute to the creation of the early tone of and climate within a group (Ellis & Fisher, 1994). For example, more dominant personalities may take early leadership roles in the group that can affect subsequent decisions. Group members' diverse skill sets and access to resources can also influence the early stages of role differentiation. In terms of size, the bonding that begins in the forming stage becomes difficult when the number of people within the group prevents every person from having a one-on-one connection with every other member of the group. Also, in larger groups, more dominant members tend to assert themselves as leaders and build smaller coalitions within the group, which can start the group on a trajectory toward more conflict during the upcoming storming stage (Ellis & Fisher, 1994).

When a group receives an external charge, meaning that the goal or purpose of the group is decided by people outside the group, there may be less uncertainty related to the task dimensions of the group. Additionally, decisions about what roles people will play, including group leaders and other decisions about the workings of the group, may come from the outside, which reduces some of the uncertainty inherent in the forming stage. Relational uncertainty can also be diminished when group members have preexisting relationships or familiarity with each other. Although the decreased uncertainty may be beneficial at this stage, too much imposed structure from the outside can create resentment or a feeling of powerlessness among group members. Therefore, a manageable amount of uncertainty is actually a good thing for group cohesion and productivity.

Storming

During the storming stage of group development, conflict emerges as people begin to perform their various roles, have their ideas heard, and negotiate where they fit in the group's structure. The uncertainty present in the forming stage begins to give way as people begin to occupy specific roles and the purpose, rules, and norms of a group become clearer. Conflict develops when some group members aren't satisfied with the role that they or others are playing or the decisions regarding the purpose or procedures of the group. For example, if a leader begins to emerge or is assigned during the forming stage, some members may feel that the leader is imposing his or her will on other members of the group. Leaders should expect some degree of resentment from others who wanted to be the leader, have interpersonal conflicts with the leader, or just have general issues with being led.

Although the word *storming* and the concept of conflict have negative connotations, conflict can be positive and productive. Just like storms can replenish water supplies and make crops grow, storming can lead to group growth. While conflict is inevitable and should be experienced by every group, a group that gets stuck at the storming stage will likely not have much success in completing its task or achieving its purpose. Influences from outside the group can also affect the conflict in the storming stage. Interpersonal conflicts that predate the formation of the group may distract the group from the more productive idea- or task-oriented conflict that can be healthy for the group and increase the quality of ideas, decision making, and output.

Norming

During the norming stage of group development, the practices and expectations of the group are solidified, which leads to more stability, productivity, and cohesion within the group. Group norms are behaviours that become routine but are not explicitly taught or stated. In short, group norms help set the tone for what group members ought to do and how they ought to behave (Ellis & Fisher, 1994). Many implicit norms are derived from social norms that people follow in their everyday life. Norms within the group about politeness, lateness, and communication patterns are typically similar to those in other contexts. Sometimes a norm needs to be challenged because it is not working for the group, which could lead a group back to the storming stage. Other times, group members challenge norms for no good reason, which can lead to punishment for the group member or create conflict within the group.

At this stage, there is a growing consensus among group members as to the roles that each person will play, the way group interactions will typically play out, and the direction of the group. Leaders that began to emerge have typically gained the support of other group members, and group identity begins to solidify. The group may now be recognizable by those on the outside, as slogans, branding, or patterns of interaction become associated with the group. This stage of group development is key for the smooth operation of the group. Norms bring a sense of predictability and stability that can allow a group to move on to the performing stage of group development. Norms can also bring with them conformity pressures that can be positive or negative. In general, people go along with a certain amount of pressure to conform out of a drive to avoid being abnormal that is a natural part of our social interaction (Ellis & Fisher, 1994). Too much pressure, however, can lead people to feel isolated and can create a negative group climate.

Explicit rules may also guide group interaction. Rules are explicitly stated guidelines for members and may refer to things like expected performance levels or output, attitudes, or dress codes. Rules may be communicated through verbal instructions, employee handbooks, membership policies, or codes of conduct (Hargie, 2011). Groups can even use established procedures to manage the flow of conversations and decision-making procedures. Group members can contest or subvert group rules just as they can norms. Violations of group rules, however, typically result in more explicit punishments than do violations of norms.

Performing

During the performing stage of group development, group members work relatively smoothly toward the completion of a task or achievement of a purpose. Although interactions in the performing stage are task focused, the relational aspects of group interaction provide an underlying support for the group members. Socialization outside of official group time can serve as a needed relief from the group's task. During task-related interactions, group members ideally begin to develop a synergy that results from the pooling of skills, ideas, experiences, and resources. Synergy is positive in that it can lead group members to exceed their expectations and perform better than they could individually. Glitches in the group's performance can lead the group back to previous stages of group development. Changes in membership, member roles, or norms can necessitate a revisiting of aspects of the forming, storming, or norming stages. One way to continue to build group cohesion during the performing stage is to set short-term attainable group goals. Accomplishing something, even if it's small, can boost group morale, which in turn boosts cohesion and productivity.

Adjourning

The adjourning stage of group development occurs when a group dissolves because it has completed its purpose or goal, membership is declining and support for the group no longer exists, or it is dissolved because of some other internal or external cause. Some groups may live on indefinitely and not experience the adjourning stage. Other groups may experience so much conflict in the storming stage that they skip norming and performing and dissolve before they can complete their task. For groups with high social cohesion, adjourning may be a difficult emotional experience. However, group members may continue interpersonal relationships that formed even after the group dissolves. In reality, many bonds, even those that were very close, end up fading after the group disbands. This doesn't mean the relationship wasn't genuine; interpersonal relationships often form because of proximity and shared task interaction. Once that force is gone, it becomes difficult to maintain friendships, and many fade away. For groups that had negative experiences, the adjourning stage may be welcomed.

To make the most out of the adjourning stage, it is important that there be some guided and purposeful reflection. Many groups celebrate their accomplishments with a party or ceremony. Even groups that had negative experiences or failed to achieve their purpose can still learn something through reflection in the adjourning stage that may be beneficial for future group interactions. Often, group members leave a group experience with new or more developed skills that can be usefully applied in future group or individual contexts. Even groups that are relational rather than task focused can increase members' interpersonal, listening, or empathetic skills or increase cultural knowledge and introduce new perspectives.

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Attribution

8.3 Listening skills

The listening process

Listening is the learned process of receiving, interpreting, recalling, evaluating, and responding to verbal and nonverbal messages. Because it is a process, it doesn't have a defined start and finish. Like the communication process, listening has cognitive, behavioural, and relational elements and doesn't unfold in a linear, step-by-step fashion. Models of processes are informative in that they help us visualize specific components, but keep in mind that they do not capture the speed, overlapping nature, or overall complexity of the actual process in action. The stages of the listening process are receiving, interpreting, recalling, evaluating, and responding.

Receiving

Before we can engage other steps in the listening process, we must take in stimuli through our senses. We primarily take in information needed for listening through auditory and visual channels. Although we don't often think about visual cues as a part of listening, they influence how we interpret messages. For example, seeing a person's face when we hear their voice allows us to take in nonverbal cues from facial expressions and eye contact. The fact that these visual cues are missing in email, text, and phone interactions presents some difficulties for reading contextual clues into meaning received through only auditory channels.

Interpreting

During the interpreting stage of listening, we combine the visual and auditory information we receive and try to make meaning out of that information. It is through the interpreting stage that we may begin to understand the stimuli we have received. When we understand something, we are able to attach meaning by connecting information to previous experiences.

Recalling

Our ability to recall information is dependent on some of the physiological limits of how memory works. As stimuli are organized and interpreted, they make their way to short-term memory where they either expire and are forgotten or are transferred to long-term memory. Recall is an important part of the listening process because it is most often used to assess listening abilities and effectiveness.

Evaluating

When we evaluate something, we make judgments about its credibility, completeness, and worth. In terms of credibility, we try to determine the degree to which we believe a speaker's statements are correct and/or true. In terms of completeness, we try to "read between the lines" and evaluate the message in relation to what we know about the topic or situation being discussed. We evaluate the worth of a message by making a value judgment about whether we think the message or idea is good/bad, right/wrong, or desirable/undesirable.

Responding

Responding entails sending verbal and nonverbal messages that indicate attentiveness and understanding or a lack thereof. We send verbal and nonverbal feedback while another person is talking and after they are done. Back-channel cues are the verbal and nonverbal signals we send while someone is talking and can consist of verbal cues like "uh-huh," "oh," and "right," and/or nonverbal cues like direct eye contact, head nods, and leaning forward. Back-channel cues are generally a form of positive feedback that indicates others are actively listening. People also send cues intentionally and unintentionally that indicate they aren't listening. If another person is looking away, fidgeting, texting, or turned away, we will likely interpret those responses negatively.

Paraphrasing is a responding behavior that can also show that you understand what was communicated. When you paraphrase information, you rephrase the message into your own words. For example, you might say the following to start off a paraphrased response: "What I heard you say was…" or "It seems like you're saying…" You can also ask clarifying questions to get more information. It is often a good idea to pair a paraphrase with a question to keep a conversation flowing. For example, you might pose the following paraphrase and question pair: "It seems like you believe you were treated unfairly. Is that right?" Or you might ask a standalone question like "What did your colleague do that made you think they were 'playing favourites?'" Make sure to paraphrase and/or ask questions once a person's turn is over because interrupting can also be interpreted as a sign of not listening.

Active listening

Active listening refers to the process of pairing outwardly visible positive listening behaviours with positive cognitive listening practices. Active listening can help address many the environmental, physical, cognitive, and personal barriers to effective listening you may encounter.

Being an active listener starts before you actually start receiving a message. Active listeners make strategic choices and take action in order to set up ideal listening conditions. Physical and environmental noises can often be managed by moving locations or by manipulating the lighting, temperature, or furniture. When possible, avoid important listening activities during times of distracting psychological or physiological noise. Effective listeners must also work to maintain focus as much as possible and refocus when attention shifts or fades (Wolvin & Coakley, 1993).

Eye contact is typically thought of as a key sign of active listening, and speakers usually interpret a listener's eye contact as a signal of attentiveness. While a *lack* of eye contact can sometimes indicate *inattentiveness*, before assuming this is the case, it's important to consider whether it stems from cultural differences, is a sign of thinking about or processing new information, or happens for other reasons.

A more direct way to indicate active listening is to reference previous statements made by the speaker. Norms of politeness usually call on us to reference a past statement or connect to the speaker's current thought before starting a conversational turn. Being able to summarize what someone said to ensure that the topic has been satisfactorily covered and understood or being able to segue in such a way that validates what the previous speaker said helps regulate conversational flow. Asking probing questions is another way to directly indicate listening and to keep a conversation going, since they encourage and invite a person to speak more. You can also ask questions that seek clarification and not just elaboration. Speakers should present complex information at a slower speaking rate than familiar information, but many will not. Remember that your nonverbal feedback can be useful for a speaker, as it signals that you are listening but also whether or not you understand. If a speaker fails to read your nonverbal feedback, you may need to follow up with verbal communication in the form of paraphrased messages and clarifying questions.

As active listeners, we want to be excited and engaged, but don't let excitement manifest itself in interruptions. Being an active listener means knowing when to maintain our role as listener and resist the urge to take a conversational turn.

Note-taking can also indicate active listening. Translating information through writing into our own cognitive structures allows us to better interpret and assimilate information.

Listening with empathy

To be a better empathetic listener, we need to suspend or at least attempt to suppress our judgment of the other person or their message so we can fully attend to both. Paraphrasing is an important part of empathetic listening because it helps us put the other person's words into our frame of experience without making it about us. In addition, speaking the words of someone else in our own way can help evoke within us the feelings that the other person felt while saying them (Bodie, 2011). Active-empathetic listening is more than echoing back verbal messages. We can also engage in mirroring, which refers to a listener's replication of the nonverbal signals of a speaker (Bruneau, 1993). Therapists, for example, are often taught to adopt a posture and tone similar to their patients in order to build rapport and project empathy.

Paraphrasing and questioning are useful techniques for empathetic listening because they allow us to respond to a speaker without taking "the floor," or the attention, away for long. Specifically, questions that ask for elaboration act as "verbal door openers," and inviting someone to speak more and then validating their speech through active listening cues can help a person feel "listened to" (Hargie, 2011). It's important to resist the temptation to give unsolicited advice. It is also important to acknowledge any feelings or emotions the speaker has expressed directly through words or indirectly through paralinguistic cues.

Listening in professional contexts

Empathetic listening and active listening can play key roles in organizational communication. Managers are wise to enhance their empathetic listening skills, as being able to empathize with employees contributes to a positive communication climate. Active listening among organizational members also promotes involvement and increases motivation, which leads to more cohesion and enhances the communication climate.

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8.4 Giving and receiving feedback

In many writing classes, students are expected to learn how to give feedback to their peers (commonly called peer review). At first, this may seem intimidating. You may think, "I'm not a teacher–how can I give useful feedback to another student?" What you CAN do is give your classmates an honest reaction as a reader and give advice based on your own experience. It is ultimately up to the person receiving the feedback to decide if they want to use the feedback they receive. If you feel unsure of your ability to give feedback, remember that you are learning from the process too. If you are unsure about the feedback you receive, you can choose to ignore it or check with your instructor. Being able to give feedback professionally is a powerful skill you will use throughout your career.

Giving peer feedback

When your role in peer review is to give feedback, your job is to help the writer by giving your reaction. Think about the kind of feedback you would like to get and also how you would like that feedback to be given. What follows here are some basic rules to follow for responding to someone else's writing.

First, listen to the writer. What kind of feedback are they asking for? Do they want to know if their message purpose is clear? Do they have questions about citing sources? Make a note about what kind of feedback the writer has requested and keep that in mind as you respond.

Be kind. When you are receiving criticism, isn't it easier to hear if the person giving the criticism is kind and respectful to you? Do the same for your peer. This doesn't mean you avoid should avoid pointing out what could be improved; rather, it means you should take care to think about your tone, word choice, and delivery in providing feedback on things that could be improved.

Comment on the higher order concerns first. That means asking questions about anything that confuses you, checking to see if the writing did what the assignment called for, and considering if the order of the message makes sense.

Use "I" statements to help stay focused on your reaction to the writing. For example, instead of saying, "You aren't clear in this paragraph," try saying, "I'm confused in this paragraph. Did you mean X or Y?"

Be specific. When your feedback includes statements like "I liked it" or "It was good," follow up with an explanation of exactly what you liked or thought was good. The same goes for criticism; say exactly what confused you or what was missing.

Ask questions. Use questions to clarify what the writer means, what the resources given are saying, and what the writer is trying to do.

Offer advice based on your own experience. Be specific and provide options, if possible. For example, you could say "If this were my message, based on my experience, you could do A, B, or C."

Don't try to make the writer sound like you. If a word is the wrong word, then note that. However, if you just think of a word you like better, that's just a matter of style and voice.

Don't edit your peer's writing for them. If you find the writer has a lot of issues or errors with writing mechanics, such as spelling, grammar, punctuation, sentence construction, paragraphing, please do make note these issues exist. However, the responsibility for correcting these errors and rewriting the material to correct these problems lies with the writer, not with you. Providing feedback is helpful, but rewriting someone's work is plagiarism and can carry serious academic consequences.

Mention what works well AND what could be improved. Imagine you were throwing a ball at a target on the wall with your eyes closed. It seems reasonable to assume you might be missing the target more than you were hitting it. Now imagine if you only heard from those around you what could be improved. Based on that feedback of what you could improve, you may or may not be able to adjust your throws and get the ball on the target. Conversely, if you only heard from those around you what you were doing well, you again may or may not be able to adjust your throws and get the ball on target. However, by combining these two aspects of feedback–what works well AND what could be improved–you're providing the person with a more wholesome view of their efforts and work, and providing them better guidance around how to improve. It does not serve them well to only provide one-sided feedback, so make sure you mention what works well AND what could be improved.

Make the most of peer feedback

Let's now consider your role in receiving feedback. Are you eager to get feedback? Scared to share your work? If you are receiving feedback from your peers, remember that ultimately YOU get to decide what feedback to accept and what to ignore. If you don't think the feedback is correct, ask your instructor what they think.

One way to improve the feedback you get is to ask for the kind of feedback you want. Don't be afraid to give your peer reviewer some direction.

Listen to or read the feedback with an open mind. Consider that the peer reviewer is your reader. It's good to know what a real reader got out of your writing.

If you aren't sure about the feedback or feel upset about it, reconsider the suggestions after a break. It's okay to say, "I'll think about that." If you feel that the reviewer is trying to change your style so that the paper doesn't sound like you anymore, consider whether the feedback helps you make the paper better. If not, feel free to set that feedback aside.

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8.5 Workplace conflict management

Questions for reflection

- Have you ever disagreed with someone at work or at school? What happened? Were you able to resolve the disagreement? How?
- How do you feel about conflict? How do you react or cope?
- What strategies do you use when you find yourself in conflict?

Conflict may typically be thought of as being negative, and it understandably can produce feelings of anxiety for many people. However, conflict is not always negative. In fact, conflict can be positive and productive, leading to creative approaches, reinforced working relationships, and more efficient outcomes.

Positive conflict is conflict where there are positive outcomes—that is, the focus remains on the issues and all parties respectfully and professionally search for outcomes that are agreeable to everyone involved. For example, say you and a colleague have to work together to develop a marketing plan for a new product your company has developed and you disagree about what tools to use. If you and your colleague are focussed on discussing the issues—what tools to use, why, and how they might help the promotion of the product—and you listen to each other actively and respectfully, then you will likely reach a solution that works for both of you.

On the other hand, negative conflict happens when the focus shifts away from finding a solution that works for everyone and towards causing harm. For example, say that instead of listening to your colleague as they explained their reasons for the tools they selected, you stormed out of the meeting and refused to answer follow-up emails from your colleague. Or, say that you and your colleague each explained your choices and listen respectfully, but then your colleague refused to use any of the tools you selected. How could these behaviours impact the ability to find a solution and move forward productively?

Harper (2004) suggests looking at conflict as being the result of unmet needs. For example, two people who hold differing view points could have difficulty understanding each other's perspective in order to move forward productively. In this case, the unmet need could be a lack of empathy or understanding. Another example might be someone who is torn between options. The unmet need in this case might be needing more information or more support.

When incompatible goals, scarce resources, or interference are present, conflict is a typical result, but it doesn't mean the relationship is poor or failing. All relationships progress through times of conflict and collaboration. How we navigate and negotiate these challenges influences, reinforces, or destroys the relationship. Conflict is universal, but how and when it occurs is open to influence and interpretation. Rather than viewing conflict from a negative frame of reference, view it as an opportunity for clarification, growth, and even reinforcement of the relationship.

Conflict management strategies

As professionals, we can acknowledge and anticipate that conflict will be present in every context or environment where communication occurs. To that end, we can predict, anticipate, and formulate strategies to address conflict successfully. How you choose to approach conflict influences its resolution. Joseph DeVito (2003) offers several conflict management strategies that you might adapt and expand for your use.

Avoidance

You may choose to change the subject, leave the room, or not even enter the room in the first place, but the conflict will remain and resurface when you least expect it. Your reluctance to address the conflict directly is a normal response, and one which many cultures prize. In cultures where independence is highly valued, direct confrontation is more common. In cultures where the community is emphasized over the individual, indirect strategies may be more common. Avoidance allows for more time to resolve the problem, but can also increase costs associated with problem in the first place. Your organization or business will have policies and protocols to follow regarding conflict and redress, but it is always wise to consider the position of your conversational partner or opponent and to give them, as well as yourself, time to explore alternatives.

Defensiveness versus supportiveness

Defensive communication is characterized by control, evaluation, and judgments, while supportive communication focuses on the points and not personalities. When we feel judged or criticized, our ability to listen can be diminished, and we may only hear the negative message. By choosing to focus on the message instead of the messenger, we keep the discussion supportive and professional.

Face-detracting and face-saving

Communication is not competition. Communication is the sharing of understanding and meaning, but does everyone always share equally? People struggle for control, limit access to resources and information as part of territorial displays, and otherwise use the process of communication to engage in competition. People also use communication for collaboration. Both competition and collaboration can be observed in communication interactions, but there are two concepts central to both: face-detracting and face-saving strategies.

Face-detracting strategies involve messages or statements that take away from the respect, integrity, or credibility of a person. Face-saving strategies protect credibility and separate message from messenger. For example, you might say that "sales were down this quarter," without specifically noting who was responsible. Sales were simply down. If, however, you ask, "How does the sales manager explain the decline in sales?" you have specifically connected an individual with the negative news. While we may want to specifically connect tasks and job responsibilities to individuals and departments, in terms of language each strategy has distinct results.

Face-detracting strategies often produce a defensive communication climate, inhibit listening, and allow for little room for collaboration. To save-face is to raise the issue while preserving a supportive climate, allowing room in the conversation for constructive discussions and problem solving.

Empathy

Communication involves not only the words we write or speak, but how and when we write or say them. The way we communicate also carries meaning, and empathy for the individual involves attending to this aspect of interaction. Empathetic listening involves listening to both the literal and implied meanings within a message. By paying attention to feelings and emotions associated with content and information, we can build relationships and address conflict more constructively.

Managing your emotions

There will be times in the work environment when emotions run high. Your awareness of them can help you clear your mind and choose to wait until the moment has passed to tackle the challenge.

Emotions can be contagious in the workplace, and fear of the unknown can influence people to act in irrational ways. You can try to recognize when emotions are on edge in yourself or others, and choose to wait to communicate, problem-solve, or negotiate until after the moment has passed.

Learn from experience

Every communication interaction provides an opportunity for learning if you choose to see it. Sometimes the lessons are situational and may not apply in future contexts. Other times the lessons learned may well serve you across your professional career. Taking notes for yourself to clarify your thoughts, much like a journal, serve to document and help you see the situation more clearly.

Recognize that some aspects of communication are intentional, and may communicate meaning, even if it is hard to understand. Also, know that some aspects of communication are unintentional, and may not imply meaning or design. People make mistakes. They say things they should not have said. Emotions are revealed that are not always rational, and not always associated with the current context. A challenging morning at home can spill over into the work day and someone's bad mood may have nothing to do with you.

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8.6 Oral presentations

Questions for reflection

- Who is someone whose presentation style you admire? Describe it. What do they do when they present that you like? Why do you like it?
- How do you feel when you have to present? Do you feel nervous? Excited? Stressed out? What do you do to manage these emotions?
- What do you do to prepare for a presentation?
- What strategies or techniques do you use when you present? How might this differ from one context, culture, or environment to another?

Many people have very limiting beliefs about presentations and their own abilities to give one. Examining your skills, fears, and preferences can be helpful in becoming more comfortable in presenting.

You don't have to be perfect

Letting go of perfection can be the hardest guideline to apply to ourselves. It's also in our nature to compare ourselves to others. You might forgive a classmate for the occasional "umm" during a speech, but then turn right around and spend a lot of mental effort chastising yourself for making the same error in your presentation. We all have distinct strengths and weaknesses. Knowing yourself and where you need to improve is an important first step. Recognizing that Rome wasn't built in a day, and that you won't become a world-class speaker overnight, may be easier said than done.

It may help to recognize that your listeners don't want to see you fail; on the contrary, they want you to do well because when you do, they will be able to relax, enjoy, and understand your presentation. You might be surprised to know that not everyone counts each time you say "umm." However, if you do tend to say "umm," "ahhh," or other filler phrases repeatedly, they can distract your audience from your message.

Organization is important

Have you ever thought of a great comeback to something someone said a while after they said it? Wouldn't it have been nice to be quick and articulate and able to deliver your comeback right then and there? Speaking in public gives you a distinct advantage over "off the cuff" improvisation and stumbling for the right comeback. You get to prepare and be organized. You know you'll be speaking to an audience in order to persuade them to do, think, or consider an idea or action.

What issues might they think of while you are speaking? What comebacks or arguments might they say if it were a debate? You get to anticipate what the audience will want to know, say, or hear. You get to prepare your statements and visual aids to support your speech and create the timing, organization, and presentation of each point. Many times in life we are asked to take a position and feel unprepared to respond. Speaking in public gives you the distinct opportunity to prepare and organize your ideas or points in order to make an impact and respond effectively.

Speaking in public is like participating in a conversation

This may sound odd at first, but consider the idea of an "enlarged conversation" described by Julia Wood (2001). She expresses a clear connection between everyday speech and public dialogue. Sometimes we take a speech turn, while at other times we remain silent while others take their turn. We do this all day long and think nothing of it. We are often the focus of attention from friends and colleagues, and it hardly ever makes us nervous. When we get on a stage, however, some people perceive that the whole game has changed. It hasn't. We still take turns, and the speaker will take a longer turn as part of an enlarged conversation. People in the audience will still communicate feedback and the speaker will still negotiate their turn just the way they would in an everyday conversation. The difference is all about how we, as the speaker, perceive the context.

Some people feel that the level of expectations, the need for perfection, or the idealistic qualities we perceive in eloquent speakers are required, and then focus on deficiencies, fears, and the possibility of failing to measure up. By letting go of this ideal, we can approach the challenge with a more pragmatic frame of mind. The rules we play comfortably by in conversation every day are the same as we shift to a larger conversation within the context of public speaking. This viewpoint can offer an alternative as you address your apprehensions and can help you let go of unrealistic expectations.

What makes a presentation successful

A successful presentation occurs when the presenter and the audience connect. Authenticity and passion can resonate so much with an audience that it can outweigh elements otherwise considered pitfalls. What you bring to the audience affects what they get from your presentation.

Verbal cues

Pitch

Do you have a deep, low voice, or a high-pitched one? We all have a normal speaking pitch where we are most comfortable, but we can move our pitch up or down. Use pitch inflections to make your delivery more interesting and emphatic. If you don't change pitch at all, your delivery will be monotone, which gets boring for the audience very quickly.

Volume

Do you speak softly or loudly? Adjust the volume of your voice to your environment and audience. If you're in a large auditorium, speak up, or better yet, use a microphone! It's not a badge of honour to avoid using a microphone; use one to help make your presentation accessible to those who may have hearing disabilities. You may need to use more volume to compensate for ambient noise like traffic or an air conditioner, or for presenting in room with a lot of hard surfaces (where the sound can bounce off and echo). You can also use volume strategically to emphasize the most important points in your speech.

Emphasis

Stress certain words in your speech to add emphasis to them, that is, to indicate that they are particularly important. You may also use a visual aid to emphasize key points by using photographs or charts.

Enunciation

Practice enunciating your words, which means practicing saying each word distinctly. If you speak too quickly, the end of one word can start to blend into the start of another. One way to compensate for this is to practice slowing down your rate of speech by taking a micro-break between each word. If you've ever been told you sound like you're mumbling (early in my career, I was told this all the time!), it helps to focus practice moving your lips, jaw, and tongue as you say each word and to speak with more volume. These techniques can seem difficult to remember in the moment of giving a presentation, but it can get easier with practice (which I know from experience!).

Rate

Are you a fast or slow speaker? The pace that you speak at will influence how well the audience can understand you. Pause for breath naturally during your speech. Your speaking rate should be appropriate for your topic. A rapid, lively rate communicates enthusiasm, urgency, or humour. A slower, moderated rate conveys respect and seriousness. By varying your rate within a speech, you can emphasize your main points and keep your audience engaged.

> If you tend to speak too quickly or too softly, try practicing some vocal exercises, such as some of those described by Julian Treasure in his 2013 Ted Talk. Vocal exercises can help reduce your nervousness and improve your voice control, making it easier for your audience to understand your message.

Filler words

Try to minimize the use of filler words, such as like, er, um, and uh, because they can be distracting if they are overused. One way to find out whether you use filler phrases is to record yourself presenting and then watch it. You might be surprised to find out you're unconsciously saying something over and over–or that you only said twice what you thought you'd repeated a hundred times! Once you are aware of your tendency to use filler phrases, eliminating them can become a goal for improvement. A technique I find helpful is to try substituting a short pause in place of where I catch myself about to say a filler word.

Non-verbal cues

Gestures and body language

A gesture is "a movement of part of the body, especially a hand or the head, to express an idea or meaning" (OxfordDictionaries.com, 2015). You can use these to channel nervous energy into an enhancement of your speech, reinforcing important points, but they can be distracting if overused. If the audience is busy watching your hands fly around, they will not be able to concentrate on your words.

Watching a recording of yourself presenting can also be informative for other reasons. It can help you pick up on your body language cues that might be distracting for your audience. For example, you might see if you sway or rock; wring or rub your hands repeatedly; or fiddle with papers, pens, or other objects in your hands. Many of these habits are often carried out unconsciously because of nervousness. Once you're aware of doing these things, you can work to eliminate them. But how do you stop, for example, swaying or twirling your cue cards if you don't even realize you're doing it? Preparation and practice are key.

Here are some techniques to try:

- If you are swaying or rocking out of nervousness, trying to stand perfectly still might be incredibly difficult. Instead, consider turning that swaying or rocking into a gentle pacing.
- If you wring or rub your hands, you can instead try gesturing as you speak.
- If you fiddle with any objects that are in your hands, then make sure you present with empty hands! For example, if you don't have papers in your hand, you won't be able to twirl them, and if you don't have a pen in your hands, you won't be able to click it open and closed.

Eye contact

By recording yourself presenting and practicing in front of friends or family, you can also gauge what level of eye contact you are making. If you find you're presenting to just one or two people in the audience, you can try practicing looking in a "Z" gaze at the audience. Look first at the back left corner, then the back right, move to the front left, and then the right front. You can then move in reverse or start back at the beginning.

If you find you're having difficulty maintaining eye contact with the audience, try looking between people in the audience, cycling between 3 or 4 different areas. While you still may not be making eye contact with anybody, you will at least be looking out at the entire audience rather than at your feet, your notes, or at the wall at the back of the room.

Silence

Silence is a powerful technique if used well, but it is often overlooked. They can add emphasis and dramatic effect when you are speaking. They can also allow your audience some time to process the information you are sharing.

Presentation techniques

There are many different presentation techniques that you can use, but there is no single technique that may be “correct” or “the best.” The key is to use the ones you think will help you connect with your audience and help maintain their interest in your presentation.

The following list describes some strategies you can consider using in your presentation. It’s important to note that this is not an exhaustive list or and it’s not an exhaustive or comprehensive discussion of these techniques.

Audience references – Highlight something common to the audience that will make them interested in the topic.

Current events – Refer to a current event in the news that demonstrates the relevance of your topic to the audience.

Question – Ask either a question that asks for a response from your audience, or a rhetorical question, which does not need a response but is designed to get them thinking about the topic.

Personal reference – Refer to a story about yourself that is relevant to the topic.

Storytelling – Include an anecdote, a narrative, or a story.

> Storytelling can be a very powerful technique to help you connect with your audience. For better or worse, audiences are likely to remember anecdotes and narratives long after the statistics are forgotten. Human beings love stories and often will walk away from a speech moved by or remembering a powerful story or example more than anything else. A story can be a brief component in your presentation, or you can structure your entire presentation as a story.
>
> From a Euro-Western dominant culture point of view, stories will often have linear structures, which is a “classic formula [where] a protagonist with goals meets an unexpected obstacle and a crisis results. The protagonist attempts to overcome the obstacle, leading to a climax, and finally a denouement. (There can also be interruptions and plot twists)” (Anderson, 2016, p. 65). However, this is but one perspective on storytelling. Storytelling structure, Protocols, and formats can differ from culture to culture.
>
> For example, Dr. Jo-Ann Archibald, a member of the Sto:lo Nation and an Indigenous studies scholar at the University of British Columbia, describes how some Indigenous stories may not have a clear beginning, middle, or end (2012b). She also explains how Indigenous stories may have more than one meaning and they need to be told within context, including who the storyteller is, where that person is from, what culture is represented in the story, and the purpose of the story (Archibald, 2012b). Furthermore, Dr. Archibald describes how there may be Protocols around the telling of Indigenous stories, such as who can tell the story, to whom, when, where, and how (Archibald, 2012a).
>
> Watch Dr. Jo-Ann Archibald (Q’um Q’um Xiiem, Sto:lo Nation) talk about Indigenous stories and their framework >>

One or more interactive elements has been excluded from this version of the text. You can view them online here: https://pressbooks.bccampus.ca/professionalcomms/?p=110#oembed-1

Watch Dr. Jo-Ann Archibald (Q'um Q'um Xiiem, Sto:lo Nation) talk about including Indigenous stories >>

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Furthermore, stories can be shared through spoken or written word, dance (such as the Lion Dance during Chinese New Year), music (such as hip hop), or visual means (such as art displays or interactive websites). 'Welila'ogwa Irene Isaac, a member of the 'Namgis First Nation and a contributing author to *Knowing Home: Braiding Indigenous Science with Western Science, Book 1*, describes how other cultural practices can be forms of storytelling as well, saying that "central to the cultural and spiritual practices of the Kwakwaka'wakw people is the Potlatch or Winter Ceremonies when stories are retold, dramatized, and shared" (2016, Chapter 14, para. 2).

What is important to take away from this brief discussion is that members of your audience may have different understandings of and experiences with what form a story takes, how it is structured, who can tell it, when it can be told, and how they (the audience) are to reflect on and interact with it. Before incorporating a story in your presentation, it's critical to consider context; Protocols; your audience; and your own relationship to the story, the story creator (or owner), and the culture from which it originates.

Preparing to Present

Here are some strategies for preparing to present.

As you rehearse and practice your presentation, try to identify the weaknesses in your delivery to improve on them. Try practising in front of a mirror or even recording yourself and playing it back. It's also helpful to get feedback from a supportive audience at this stage. Perhaps a few family members or friends could watch you give your presentation and provide some feedback. These sessions should help you get comfortable and help you remember what you want to say without having to constantly refer to notes.

If at all possible, access the room where you will be presenting. This way you can get a feel for its setup and decide how you will stand or move during your presentation.

If you are using technology to support your presentation (i.e., PowerPoint slides or a projector), test everything before you begin. Do a microphone check and test its volume, view your slides on the computer you will be using, check any weblinks, play videos to test their sound, or make a call to test the phone connection prior to your teleconference. Your audience will get restless quickly if they arrive and are expected to wait while you fix a technical problem. This can also make you seem disorganized and hurt your credibility as an authoritative speaker.

Contingency planning

Well before the day of your presentation, ask yourself, “What could go wrong?” This might sound like a good way to stress yourself out, but it can actually be very helpful. If you anticipate the worst-case scenario and are prepared for it, problems on the day of your presentation are less likely to bother you.

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