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Workplace Writing: A Handbook for Common Workplace Genres and Professional Writing

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Workplace Writing

A Handbook for Common Workplace Genres and Professional Writing Strategies

- Anna Goins
- Cheryl Rauh
- Danielle Tarner
- Daniel Von Holten

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Foreword: Course Introduction

Welcome to ENGL 417: Written Communication for the Workplace, a course that explores writing genres commonly used in professional workplaces. These genres include various types of correspondence—letters, memos, and emails—as well as reports, proposals, and abstracts (or summaries). As a student in this class, you will study how these written genres are shaped by different workplace rhetorical situations, or contexts. Indeed, knowing the rhetorical context (audience + purpose) of any situation in which information needs to be shared will help you navigate available document formats, and will help you learn to write for similar yet inevitably different workplace situations.

What do we mean by that? Primarily, we want you to be aware that your writing classroom will be filled with students from a variety of majors and minors, some of whom are required to be there and some of whom elect to take the course based on their own educational goals. Because of this, your conversations, activities, and assignments throughout the semester will center on generalized writing skills that can be adapted to any number of particular work environments. This also means that your classroom will not be lecture-based, but skills-based, thus asking you for consistent engagement with, and application of, course concepts.

Course Objectives

Here are the key objectives you will be able to meet as a writer by the end of the semester:

- Identify the audience or audiences of a writing task and analyze their needs, attitudes, expectations, and the rhetorical purpose of the writing task in order to present information accurately and persuasively.
- Produce documents typically required of workplace professionals that meet readers' informational needs and genre expectations (e.g., they are well-organized, acknowledge realistic constraints, credible, current, comprehensive, and accurate).
- Identify a work-related problem or opportunity in order to complete a project that presents results, discussion, and conclusions.
- Gather, analyze, evaluate, and/or synthesize information from print and electronic sources, including workplace documents, to develop writing projects and present and document sources accurately and ethically.
- Integrate visuals, text, and basic principles of document design using appropriate digital technologies.
- Adapt a written text for the purposes of an effective, professional oral presentation.
- Revise and proofread documents for readability, accessibility, ethical presentation, style, tone, and usage.

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Introduction

The Writing Process

In order to help you meet the course objectives, you will rely on the foundational writing process, a series of recursive steps that take you from planning a message to completing it. How people talk about the writing process can vary, but most agree that it begins with an analysis of the task itself and its audience, moves toward research and idea generation, then to drafting and revising, and ends with editing and proofreading. We'll add an emphasis on document design to those final steps in order to reflect the expectation of polished materials in the workplace.

The chart below demonstrates the nonlinear (or recursive) nature of the writing process, particularly in the drafting and revising stage. Simply put, you will likely be performing several parts of the writing process at the same time: brainstorming ideas can lead to research which can lead back to new ideas; clarifying main points can send you back to your planning outline or idea web, etc.

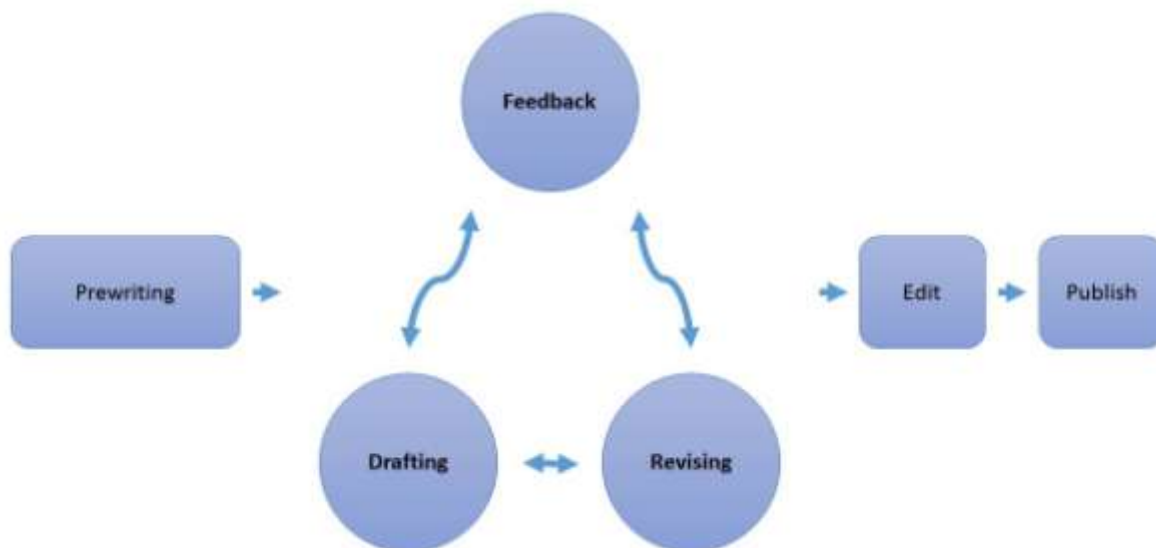


Figure 1: The Writing Process

Depending on the situation, you may move through some of the stages quickly. For example, you probably wouldn't spend a lot of time editing in an IM or text conversation with a coworker, but you would take the time to edit an email to your supervisor or a potential client. Generally, the higher the stakes and the larger the project is, the more involved the steps become.

Let's continue to apply the writing process to the workplace by examining the role planning plays in the writing process and its relationship to rhetorical analysis.

Planning Your Document

Planning involves setting goals and determining procedures that will lead you or a group to completing a project or task. Basically, becoming adept at planning comes down to two things: analyzing the writing situation and identifying different planning strategies to best fit your situation.

Analyzing your Situation

Analysis comes into play throughout the writing process. Early on, you will need to analyze your writing situation to determine what approach will work best in terms of completing the task as well as identify any constraints—time, financial, staffing, etc.—within which you might have to work. Initially, you should focus mostly on identifying your purpose for writing and analyzing your audience.

Rhetorical analysis is the act of interpreting something (a problem, device, concept, etc.) by breaking it up into its component parts with the goal of developing a deeper understanding of the thing being analyzed. Analysis should not be confused with evaluation, which starts with analysis, but involves making a judgment of worth based on established criteria.

The Rhetorical Triangle (Fig 2 below) illustrates four key concepts to consider when analyzing a rhetorical situation.

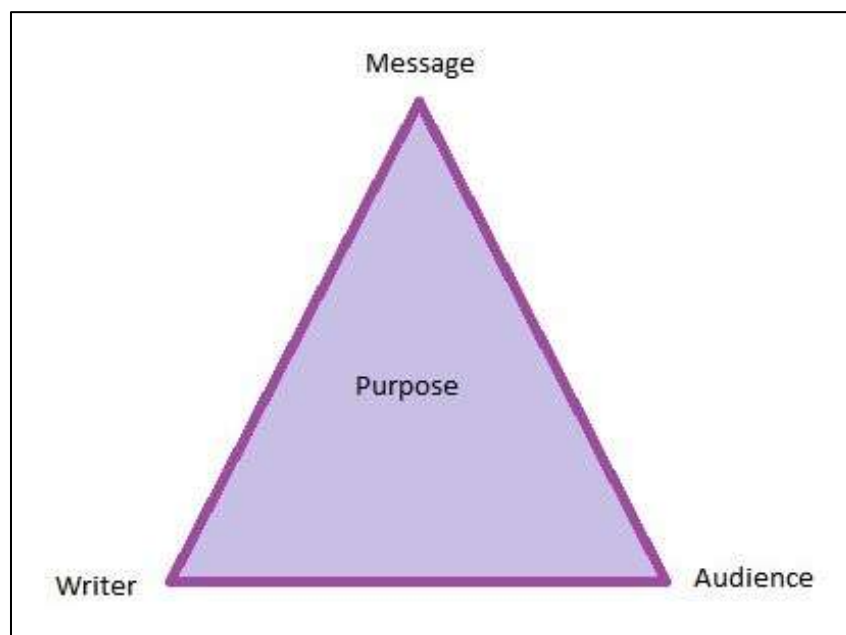


Figure 2: Rhetorical Triangle

The *purpose* for each writing task will usually fall into one of three main categories: to *inform/create a record*, to *persuade*, or a *combination* of informational and persuasive.

Perhaps you respond to an email requesting an answer to a budget question—that would be routinely informative; perhaps you send an email requesting that someone provide you with information—that would be routinely persuasive. A combined purpose would be reflected in a [job application letter](#) as you must provide clear information about yourself as a job candidate while at the same time work to persuade your audience to consider you for the job.

On the job, you might analyze sources of information to determine their credibility and to break down the information offered in the sources. Towards the end of a project, you might also analyze your own writing to determine what revisions to make.

The Rhetorical Triangle is a mnemonic for key concepts, but also for remembering that each of those concepts are related parts of the rhetorical situation. You can analyze the situation by asking questions related to the concepts and their relations to one another. Try asking yourself the following questions:

- What is my purpose/goal with this writing task? What information do I need to provide to satisfy this purpose/goal?
- What does the intended audience or audiences already know about the topic?
- What new information or perspective can (should) I offer on the topic?
- How should I present the information: in an informative or persuasive manner?
- What preconceptions, concerns, or questions might reader(s) have? Will they be resistant to anything I have to say?
- What is my relationship to the reader? How will that effect how I present my message?
- Why will my audience or audiences read this? Do they have different needs or purposes in reading?
- What design or format conventions do I need to follow?

Knowing your Audience

When writing, it's easy to get carried away with your own perspective and needs, particularly if you have strong personal interests in or deep prior knowledge of the topic. However, in workplace writing, *the reader's interests and expectations take priority*. This is because the reader will likely take some sort of action in response to your message. Therefore, a key part of planning a workplace document is stepping back and analyzing your reader, trying to understand what the reader has to gain—or lose—from the message. As you plan your message, try to imagine your reader constantly asking: “What does the writer want or need me to do with this information?” And, perhaps, “What’s in it for me?”

Consider these two different lines from a [job application letter](#):

- **Writer Focused:** “This job is a great opportunity for me to gain experience in financial services and would be a great first job for me coming out of college.”
- **Reader Focused:** “My ability to build rapport with others will help me build trusting relationships with customers and better identify what services they would benefit from, thus strengthening their bond with your company.”

In both cases, the writer is mentioning herself in the first person, but that doesn't mean both are focused on the reader's needs and perspectives. The first example is focused on her desire for the job while the second one is instead focusing on what the reader has to gain from having her as an employee. What particular writing choices does the second example employ in order to focus on the reader?

One of the biggest adjustments when transitioning to workplace writing is keeping the needs of the reader at the center of all your writing decisions.

Cultural Awareness

Whether you're writing for an internal or external audience, effective writers know that cultural considerations are key to building and maintaining strong professional relationships. Such considerations might be related to social demographic areas like gender or ethnicity, or they might be tied to language proficiencies and cultural preferences. Your job as the writer is to consistently be aware of the relationship between your own writing choices and your audience's expectations and needs.

It is not the reader's job to ascertain what you meant: you must provide the content in a way that unequivocally delivers your intended meaning.

Project Schedules: Managing Your Writing Tasks

Just as analysis can help you clearly define what your purpose is and strategize how best to reach your reader, taking a few moments (or several!) to develop a writing plan can save you time, particularly on larger collaborative projects. Planning can feel a little overwhelming when you're approaching a new kind of project. You may feel like you can't possibly know every goal or task you need to have in order to finish everything. This can be especially true if you're facing an unfamiliar project, or something that's out of your routine. However, if you stay flexible in your approach to planning and keep in mind that you can always adjust as you gather more information, you will find that creating a plan makes you a more efficient and competent writer in the long term.

Rather than thinking of your plan as a static "carved in stone" document, you should approach it as a "living document" that gets updated regularly.

Establishing Goals: Identifying the questions to be answered

To start, figure out what your goals in writing actually are. In most cases, these will come directly from the overall purpose you identified for your task—Reader X needs Y information. They are also often related to research needed to fulfill that purpose—I need to find out Z about Y before I can share it with Reader X. You should also keep track here of how persuasive or objective your presentation of ideas will need to be in order to satisfy your overall purpose.

You may also have some personal professional goals that you'd like to work toward as you complete the project, particularly if you're writing something new or have a particular skill you want to develop. The key here is to integrate those particular goals within the larger context of the project itself by identifying specific aspects of the project that correlate with your intentions. For example, from the scenario in the previous paragraph, you might connect your personal goal of becoming more adept at research with the larger task of gathering the kind of information necessary to meet Reader X's expectations.

Moving from Goals to Tasks

Once you have a list of project goals, make a list of the steps or writing tasks you need to complete in order to reach those goals. Here again you may feel like you don't know enough to come up with a detailed plan. Keep in mind that the process of writing is recursive and that you may come back and develop your plan more as you move along. Initially, you should outline a rough idea of your writing process based on what you want to accomplish and when it should be done: audience analysis/awareness, research, drafting and revising, editing and proofreading, etc.

Moving from Tasks to a Timeline

The last step in creating your plan together is to put your tasks on a timeline. Typically, you will have a hard deadline for the final draft. On larger projects or collaborative projects, you may have set dates for progress reports, meetings, and/or drafts. List out anything with a fixed, external deadline along with any sliding, internal deadlines in order to create a calendar. From there, determine when you need to have certain tasks finished in order to meet your goals within the designated deadlines.

You might set up your timeline to complete the final draft before your deadline. In the best of situations, you'll simply be done early, but, if problems do come up, you'll have a little room to make adjustments without needing a 24-hour writing session.

There are a few formal ways you can represent your plan, which are discussed below, as well as any number of informal approaches, such as a handwritten outline or checklist. Be willing to try a few different methods in order to find an approach that works best for you (and the writing situation).

Task Schedule

Some people work well with a task schedule that presents tasks and deadlines, usually in a table of some kind. This is a quick and easy way to put your plan together, but it doesn't give you or other readers a sense of the time involved. Therefore, a table works well with small projects and short timelines.

A sample task schedule can be seen in the [collaboration chapter](#).

Gantt Chart

A Gantt Chart is a type of bar chart that shows the start and end dates of different elements of a project. There are lots of fancy programs that focus on making Gantt charts, but you can make a simple one using a spreadsheet. Use the x-axis to represent dates and the y-axis to represent elements of the project (tasks). This approach helps you visualize overlapping elements of a project and can help you plan which days on the project will be the busiest. This approach is particularly useful when planning a group project because you can add a column to represent each person assigned to a task.

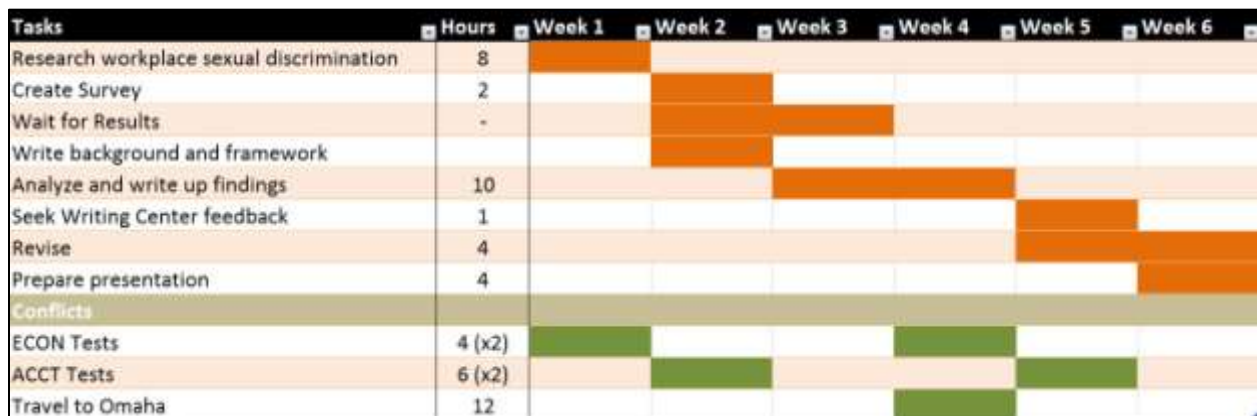


Figure 3: Sample Gantt Chart

Research in the Workplace

So far, we have looked at skills central to planning and preparing to write in the workplace. Another foundational skill that will help you meet your writing objectives is research, or the act of gathering information. Given your prior experiences in academic writing, you are likely already familiar with the

more formal, comprehensive type of research required by essays and reports that seek to demonstrate knowledge on a topic. However, there is a very good chance that when you enter into your professional fields, you will face tasks and projects that require you to gather very specific information in order answer immediate questions or solve problems.

In the workplace, audience awareness also plays a key role in gathering information. Indeed, if your intent to is to truly understand the needs and concerns of your readers, and to connect to that understanding your message itself, you might need to spend as much—or more!—time researching your audience as you do the topic.

Common Types of Research: Finding Information

Generally, there are two ways of categorizing research: primary and secondary.

Primary research is likely the most unfamiliar to you as students, but it is perhaps the most common type of research in the workplace. It is, in short, information unmediated by anyone other than the writer. This can include published results of original studies, but what you're more likely to encounter in the workplace is *self-generated primary research*—here, *you* are the author of the information: you design the survey, conduct the observation study, interview someone, etc. Primary research also includes making inquiries by sending letters or emails, and by making telephone calls. Thus, primary evidence does not undergo any outside process.

Secondary sources, such as news articles, have undergone an outside process. For many, secondary research is actually what we think of first when we think about gathering information, and includes all the common resources of our library: academic journals, books, industry/trade publications, magazines, newspapers. Secondary research can also include the primary research of others.

In the workplace, it's unlikely that you'll head to the library, brick and mortar or otherwise, to complete your research; rather, you often will look to company records or files, consult institutional memory by talking with someone who has worked for the company for a long time, and/or utilize the plethora of resources available online.

Now that you know a little more about the common types of sources, we need to consider the importance of evaluating the credibility of the information you collect from them.

Evaluating the Credibility of Research

Underpinning your application, analysis, and interpretation of information is the credibility of the information itself. Your professional reputation is often tied to this credibility. Your readers may reject an idea or decide not to pursue a claim if you fail to provide the necessary support. So, what do you need to know when it comes to evaluating a sources? The following section will (re)introduce six criteria to consider when choosing whether or not to include a source in your documents. Taking the time to apply the six principles will help ensure that your information is top notch and will be effective in persuading and informing your readers. Let's look at the components.

Current

In most cases, your workplace readers will want up-to-date information. Looking at when the source was published or posted is a good first step. Be sure to look and see whether or not the author updated or revised the information. Also, be aware of web links that are no longer functional. Nothing is more

annoying than clicking a link or entering a URL only to find it no longer works. Of course, not every topic demands the most current source; in some cases, an older, established source is acceptable. For example, you may need to outline what has been done in the past in order to establish precedence for a policy. So, once again, it pays to begin by analyzing the rhetorical situation (i.e. your audience and purpose) thoroughly in order to determine the importance of obtaining the most current information.

Authority

Here you take the time to investigate the credibility of the writer(s) of the source. Try and answer the following:

- What qualification or credentials do the author/publisher/sponsor have?
- Is there a peer review process for this research or is this source sponsored by a commercial non-profit, or special interest group?
- Is the author in fact qualified to write on this topic?
- Is there any contact information in the authority of the source?

When using web sources, you can often learn a lot by simply looking at the site's URL (.com .edu .gov .org .net, for example).

Accuracy

Unless you are using peer reviewed sources, it is important to do a little fact checking. Plan on looking in a couple different locations to validate the information; in the process, you may find a more reliable source to use in your project. For example, verify the statistics you find in grey literature like brochures or magazines. Once you have considered where the information came from, you want to look critically at the evidence using to support the claims.

- Has the information been reviewed by others?
- Can you verify the information to be accurate in another source, or from your own knowledge?
- Look at the word choice; is the language used unbiased and free from emotions?
- Do you note any spelling, grammar, or typographical errors that be a good indication that the accuracy of the source can be called into question?

Purpose

When analyzing a source's purpose, consider the following:

- What the source's main purpose? Is it intended to inform, educate, entertain, sell, or persuade?
- Does the author/sponsor make the purpose clear?
- Is the writer's point of view appear to be objective and impartial?
- Is the information fact, opinion, or propaganda?
- Is there a clear political, ideological, cultural, religious, institutional, or personal bias in the content?

You want your research to remain as unbiased and objective as possible. This means undertaking the research gathering process without a predetermined outcome in mind, and remaining true to the facts rather than letting personal opinions overshadow those facts. When bias is unavoidable, a not uncommon situation, you will need to acknowledge the role bias is playing in a source in order to determine if the source's bias will diminish the credibility of your research. For instance, if you are looking at product or service information on a company's website, this information is going to be quite positive because the purpose of the website is to persuade and sell the company's product or service. In order to remain objective in this case, you would want to look at another source for reviews of this product in order to learn of potential drawbacks or customer complaints.

Relevance

Be very clear about why you are using each and every source; basically, you want to make sure the source matches up with the rhetorical situation: your purpose and audience for writing the document.

Also, at this point it is a good idea to ask yourself: Do you want to either avoid sources of information geared towards a very different reader from your own or are you able to bridge that gap for your reader? You do not want to alienate your reader by using sources that are not at an appropriate level. For example, you could validate the relevance of a national statistic by surveying employees in a small workplace to see if the trends are comparable.

- How are your readers going to use this information?
- Who was the intended audience of this source?

Variety

One final recommendation for ensuring the credibility of your research is to diversify your source types. Remember the common types of research we discussed above? Well, it is a good idea to gather the same sort of information in a couple of different ways. Your reader will be more likely to adopt your recommendation or agree to your proposal if your ideas are backed up with more than one type of research.

Bottom-line: be willing to look at a variety of sources (rather than simply grabbing the first one you encounter) before deciding what to include in your project. Too often, a writer's credibility and the overall integrity of her researched work is diminished when the first source is selected without thoroughly looking at a variety of information.

In addition to effectively persuading and informing your reader, taking the time to investigate the currency, authority, accuracy, purpose, and relevance of your sources can save you time in the long run. And, by focusing on gathering quality research that meets these criteria, you are also safeguarding your professional reputation.

Citing Your Sources

Once you have worked hard to gather relevant, current information from a variety of credible, accurate sources that align nicely with your project's purpose, you need to know how to properly cite that information. And why fuss with proper citations? As long as you do not deliberately copy the work of another or falsify your primary research who will really care? Often, the person(s) who authored the source cares a great deal- they expect and deserve to be given credit for their ideas.

Also, you want your readers to know when you are using your researching skills to support your points; impress and dazzle them into taking action based in part on the research you incorporated into your company's [proposal](#) or [formal report](#). Additionally, properly citing research can add a great deal of credibility to your project and prevents your reader from challenging your claims.

A final reason why citations are important is a matter of efficiency: citations provide an easy way for recording and retrieving the original source for future reference; you will have readers who are interested in taking a closer look at the sources you have referenced in your document and may even offer you additional resources to consider using in your project. Now that we have hopefully convinced you that proper citation are important, let's look at how to craft great citations.

We will be using the APA style in the following examples. Keep in mind that the exact format of your citations will depend on the style being used in your particular industry; the most common styles are MLA, APA, and Chicago. Your instructor, and later your company or organization, will likely determine the style manual you will be using. However, all of these citation styles have two main components in common: they require both an in-text citation as well as a full reference at the end of the document. Only the format for these two components will vary depending on the style being used. You can find explanations and examples of all types of sources (book, websites, interview, etc.) using MLA, APA, as well as Chicago style at [Online Writing Lab \(OWL\)](#) part of Purdue University's website.

Using Someone Else's Ideas: When to Summarize, Quote, and Paraphrase

An important aspect of researching is knowing how to most effectively *use* the information you've found. How, then, do you decide when it is best to summarize, directly quote, or paraphrase source information in your work? Proper citation, as guided by your professional industry, is equally important here.

Let's start with summary. You use a summary when you want your readers to have the general gist or main points of a source, but do not need to get into the details. Summaries are notably shorter in length than the original because they focus on reiterating the main points in *your own words*. For example, this can mean taking an entire chapter or lengthy report and siphoning it down to just a few sentences or a paragraph. In order to avoid plagiarism, be sure to avoid using any of the original author's phrasing or syntax. A helpful strategy here is to write your summary without looking at the original.

Next, let's look at quoting. You have decided that you want to keep the information as it appears in the original. Sometimes, including a quote from an authority on your topic can add validity and credibility to your project. And, in some cases, there is simply no way to change the author's original wording and still retain the emphasis and clarity of its meaning. In these instances, you want to quote the source. Here, you likely already know that you need to include a set of quotation marks around the text and an in-text citation that aligns with the full citation located at the end of the document in your works cited, references, or bibliography. Here is an example of a passage followed by the same text properly quoted in the APA style:

Original Passage from a Published Source

Your networking will be much more effective if you build relationships with your contacts. Look beyond the short term goal of acquiring your next job to the task of forging contacts that will be beneficial in your new position and for future career transitions.

Properly Quoted Passage using APA

“Your networking will be much more effective if you build relationships with your contacts. Look beyond the short term goal of acquiring your next job to the task of forging contacts that will be beneficial in your new position and for future career transitions” ([“Networking Tips,” 2015](#)).

Lastly, let’s look at proper paraphrasing. Too often, we believe that by simply changing one or two words from the original we are employing paraphrase. This is not the case. A proper paraphrase requires you to use your own words and unique voice, just like in summarizing. Paraphrases are useful when we want to focus on the details that might get left out of a summary, or when the original text is too dense or full of jargon for our own audience’s needs. Paraphrasing helps prevent your readers from having to do more work in deciphering the content you’ve deemed important to your message.

Even with a citation, not properly rewriting the content and inadvertently using the author’s language without quotation marks is in fact plagiarism. Look at the following original passage followed by a paraphrase for an example.

Original Passage from a Published Source

Your networking will be much more effective if you build relationships with your contacts. Look beyond the short term goal of acquiring your next job to the task of forging contacts that will be beneficial in your new position and for future career transitions. When establishing a relationship with a new contact, communicate your sincere interest in his or her work and advice and be informed enough to have a conversation about his or her job. If you remember that you are building a professional relationship and not just a casual acquaintance, you will approach the networking process with a greater sense of purpose. ([“Networking Tips,” 2015](#)).

Properly Paraphrased Passage using APA

Successful networking involves investing the time in forming a professional relationship with someone in your field, but not just to get help landing a particular job. Think of networking as seeking mentors who you can build a relationship with and who you can consult with throughout your career. ([“Networking Tips,” 2015](#)).

Regardless of whether you summarize, quote, or paraphrase a source, you will also want to list the complete citation at the end of your document according to the style dictated by your industry.

Drafting and Revising Your Documents

When you have gathered sufficient information to satisfy the rhetorical situation of your writing task, you are ready to put words-on-paper/screen, and begin drafting your message. Remember, too, that you don’t need to wait until the entire message is drafted to begin revising; often going section-by-section in longer messages can help you better focus on the content’s accuracy. Full-document revising can then focus more on audience awareness and effective organization.

While it can be useful to rely on a trusted colleague to provide a second set of eyes for revision, often taking a physical break from the text (as in, getting up from your desk and walking away), however brief, can also be remarkably helpful.

Editing Your Documents

The final step in your writing process is editing. During this stage, regardless the length of the message or its category as formal or routine, effective writers assess their documents for accuracy in three areas: formatting, grammatical correctness, and tone/style.

Formatting

The last piece of the rhetorical situation puzzle is choosing the best format with which to present your message. Format, or genre, options are commonly designated as routine or formal, and there are several choices within each category. Your job is to match the audience and purpose of the message to the most appropriate format. For example, if your message is a brief update to your boss on a longer project, you would need to decide if an [email](#) or [memo](#) would be most appropriate. Part of your decision rests on your understanding of the audience's preferences—maybe they dislike email—as well as your understanding of the genres themselves. You'll learn more about common workplace genres as the handbook continues.

Grammatical Correctness

Likely what most of us consider editing, checking for grammatical correctness is an important step in providing professional polish to your written work. Here, we look for accurate spelling, consistent tense use, and proper Standard American English usage.

Style and Tone

Lastly, you want to consider the document's overall style and tone. Style refers to the sentence-level choices you make, i.e. word choice and syntax, which add up to the overall attitude conveyed through the message, the tone. Contemporary North American workplace writing seeks to be active, concise, and direct.

For more information, please visit these handouts from The University Writing Center at Texas A&M:

- [Clear and Concise Writing](#)
- [Active-Passive-Voice](#)

Activities

Workplace Writing

1. Find three examples of workplace writing. These examples could be promotional letter you received in the mail, or an email that provides information about a product, or memo from your boss (please feel free to remove any identifying information, if necessary). Then for each document, answer the following:
 - What is the document's purpose(s)?
 - How would you characterize the primary reader(s) of the documents? Are there are also secondary readers?
 - What genre is the document (letter, email, report, flier, manual, etc.)?
 - Does the document contain any visuals? If so, how many? What is the purpose of each visual?

- Describe the document’s layout and organization.
- Describe the document’s use of color. What do the color choices reveal about the writer’s understanding of audience?

Be sure to bring both your examples and analysis to class as instructed by your teacher.

Planning a Writing Project

2. Alex, a safety consultant for OSHA, has been asked to respond on behalf of the United States to the recent controversy surrounding the building of the FIFA World Cup facilities in Qatar. While he already knows quite a bit about construction safety from his own professional and cultural perspective, he knows that he needs to research safety standards and issues in global construction as well as human rights/labor protection guidelines, before he can effectively reach his audience. He decides to create a plan, or writing schedule. Use the following prompts to create a plan or schedule to help Alex fulfill his writing project goals:

Rhetorical analysis:

- Who is his primary audience? Is there a secondary audience?
- What is the overall purpose of this project?
- What is the final deadline for the project’s completion?
- What are the writing steps necessary to meet that purpose?
- What are his scheduling, or process, goals?
- How should he best schedule the writing tasks in order to meet that final deadline?
- What personal or professional learning/development goals might he set for himself?
- What aspect(s) of the writing process could he want to strengthen during this project?

Research

3. Conduct a brief interview, either in-person or via email, with a professor in your major, seeking answers to questions you have about the field. Prepare your findings as instructed and share with the class.
4. Look for a trade journal in your field. [Note: K-State librarians are a great resource if you’re not sure where to begin.] Browse the table of contents, scan the articles, glance at the ads, etc. Overall, what kind of information is being shared? Who are the writers and the readers? In what ways can trade journals be useful to you as you prepare to enter the workforce?

Cultural Awareness

5. In pairs or as a small group, research “high and low context cultures” and prepare a brief report on your findings that both provides a definition of terms and applies them to the contemporary workplace. Your instructor might request a written or oral report of your findings.

Editing

6. Using the weakest of the three examples of workplace writing that you found earlier, practice your editing skills by making formatting suggestions or changes, necessary grammatical fixes, and offering more professional style and tone suggestions, as directed by your instructor.

Writing in the Workplace: Common Genres

Correspondence

In this chapter, we're going to talk about routine correspondence genres: emails, memos, and letters. These are the genres you'll use on a day-to-day basis for any number of purposes when writing to any number of audiences.

Correspondence genres are very flexible and adaptable, so your most important concern is with [audience analysis](#). Figure out what your audience needs and adapt the content, organization, tone, and style of your message to suit that audience.

Because these genres are flexible, this chapter will focus on how to choose a correspondence medium that fits your purposes, and on ways to adjust your content to fit how audiences read each genre.

Rhetorical Context

Any day-to-day writing situation can call for any one of the correspondence genres, so it's important to understand how the features of each genre suit it for different purposes and audiences.

For routine messages, there are two main categories of readers: internal and external. Internal readers are those with whom you work on a consistent basis, whether that be within the same company, called in-house, or within the same field (i.e. a supplier for your hotel or restaurant). You can often communicate more informally with internal audiences.

In contrast, external readers are those readers whom you contact infrequently and/or with whom you are unfamiliar: clients, distant company management, etc. These readers are more likely to judge the formality of your document.

Another section of external readers includes the public audience for your business. Regardless the industry, there will always be a need to share information with a general readership, and we will talk more about those readers' specific needs in a separate chapter.

Choose your Format

Emails are used for quick, short electronic communications to both internal and external audiences, so they are typically the least formal correspondence genre. Emails are useful because they can be directed towards individuals or large groups, and email systems keep convenient copies for workplace records. Finally, emails allow for attachments and links, so they're a useful medium for sharing larger documents and connecting people to web content.

Memos are used for short internal communications. The memo format is often used for sharing short [reports](#) and [proposals](#) or for communicating changes in [policies](#). In the modern workplace, many memos are shared as email attachments, but memos are also designed to be distributed in print through office mailboxes or through posting in community workspaces where many employees can read them. They can be important in workplaces where employees don't have regular access to email.

Letters are typically used for more formal communications with external audiences. The formality of a letter is what differentiates it from emails and memos. If you are trying to build or maintain a professional and personable relationship with a client or partner company, letters are the genre for you.

The biggest disadvantage of a letter is that mail is significantly slower than in-house or electronic distribution.

You should select the medium best-suited for your distribution needs and the formality appropriate to the audience you are targeting.

Email Conventions

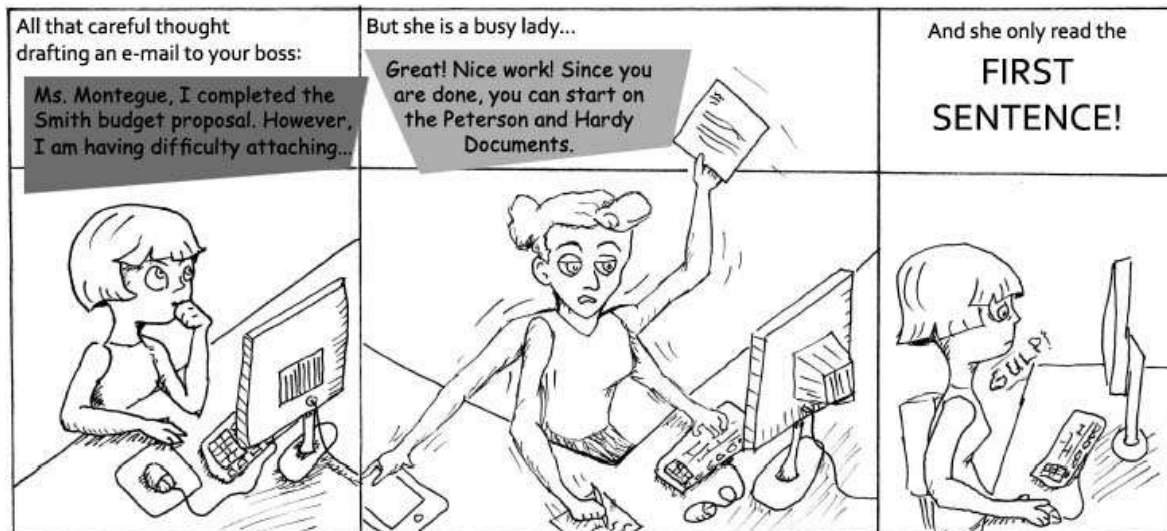
Email is the most commonly used workplace genre because the messages are quick, save paper costs, and maintain records of communications. Their features make them the most practical genre for typical low-stakes communication.

Features of an email

- electronic format—inexpensive and easy to distribute
- variable audiences—you can send to individuals or groups of any size
- subject line—readers can decide to read or delete without opening
- automatic record keeping—email systems record *all* emails (remember to be professional at *all* times)
- allows for attachments—you can distribute longer, more detailed documents
- allows for links—you can connect readers with more detailed information

Be careful to include full links rather than hyperlinks because emails set to plain-text formatting will strip away hyperlinks. A full link can be copied and pasted into a browser even if the link itself has been removed. Additionally, be sure to follow-up on emails that include links because links can increase the chances of your email being directed to the junk folder.

Emails are also the genre where the most miscommunications occur because readers read them very quickly. They often reply to emails as soon as they *think* they know what you're saying or asking in order to efficiently handle the volume of emails coming in. For this reason, make sure to carefully construct your emails, especially considering that readers may skim or stop before the end.



The comic illustrates this effect in action. Because the boss is so busy, she stops reading after the first sentence, “I completed the Smith budget proposal” because she thinks she knows what will follow. By trying to read efficiently, she misses the fact that there is a problem. Writers should keep in mind that many readers will make assumptions and take shortcuts to save time.

To support readers in effectively reading an email, you should:

- Write a clear, descriptive subject line that encourages the recipients to open and read it.
- Make the overall purpose and message of the email clear in the first couple of sentences.
- Break the email into extra-small, manageable chunks to support effective skimming.
- Keep the email short and concise so it can be read quickly.
- Limit your formatting because it doesn’t always transfer well, e.g. odd line breaks and list formatting disappearing.
- Make sure you remember to proofread.
- Verify you have included all attachments.

Memo Conventions

Memos follow emails as a convenient, quick genre for routine workplace messages, usually in-house. The format is frequently used for a variety of short [reports](#) and internal [proposals](#) because it relies on a professional yet personable tone and style, direct organization, and efficient document [design](#).

Features of a memo

- Organization name (optional)
- Memo label (optional)
- Header (To, From, Date, Subject)
- Introduction
- Body with headings
- Conclusion with courteous close (optional)

Header

Memo headers are intended to help workplace readers quickly understand the authority of the memo and its purpose. To do this, all memos should have the following standard elements in the heading:

- To:
- From:
- Date:
- Subject or Re:

This heading style supports readers in quickly determining the importance of the memo by:

- Making clear the reader is the target of the document.
- Indicating the authority of the document by designating the author and the currency (via the date).

- Clarifying the purpose of the memo through a brief but clear and descriptive subject line that alerts readers to the overall focus of the message.

Additionally, it is standard to write out the date in a memo heading. This assures that all audiences will read the date accurately. For example, if you write the date as 06/12/2015, some may read this as June 12, 2015, while others would read this as December 6, 2015. Writing out the name of the month eliminates the possibility of confusion.

Introduction

As with all other documents, the introduction should help readers get oriented to each document’s purpose and scope. Remember to establish the rhetorical context early in the introduction so that recipients understand why they’re receiving the memo and why they should continue reading.

Body

The body is, of course, where the bulk of your important information goes. To support readers in effectively reading your memos, you should utilize effective organizational strategies to guide readers efficiently through the memo:

- Descriptive subheadings
- Bulleted lists
- Topic sentences and transitional sentences
- Visuals to complement written text, especially complex information

Conclusion with Courteous Close

The conclusion of a memo is like any other—it summarizes the basic message of the document, and calls readers to any necessary action that should be taken as a result. Additionally, because a memo is a correspondence that seeks to maintain a positive workplace environment, it may also include a courteous closing that leaves readers with a very clear understanding of what they need to do with the information provided, e.g. “Please let me know by Wednesday if you have any questions about this new policy.”

Letter Conventions

Letters remain our most formal and polished genre option for workplace communication. For this reason, you will likely rely on this format for external, or out-of-house, messages as well as for official personnel records (job offers, contract and salary information, for example, as well as annual job evaluations/reviews). Signed letters still serve as legal records and are thus often subject to company review to assess potential liability concerns.

Features of a Letter

- Letterhead or Sender’s Address
- Date
- Inside Address of the Recipient (include full names and titles, i.e. President Bob Smith)
- Salutation

Example Salutations	Dear Mr. or Ms.:
---------------------	------------------

	Dear Dr.: Dear President Smith:
Notes	If you don't have a specific name, or if you are unsure of the recipient's gender, simply use the full name: Dear Pat Smith: Unless you have explicit knowledge that a married woman prefers "Mrs.," use the professionally inclusive "Ms." Business letters often use colons in salutations because they can create a more formal tone than a comma.

- Introduction
- Body Content
- Conclusion and Courteous Close
- Closing

Example Closings	Sincerely—always in style and appropriate Regards, Best regards, or Warm regards—adjectives vary upon readers and industry Best wishes—common in more casual fields
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- Enclosures, if any (can be abbreviated to Encl.)
- Typist's Initials, if other than sender

Formatting a Letter

There are two main options when formatting a letter: full block or modified block style. **Full block** is the simplest choice where all the text is flush with the left margin while **modified block** relies on indented body paragraphs and an address and closing left-aligned with the center of the page.

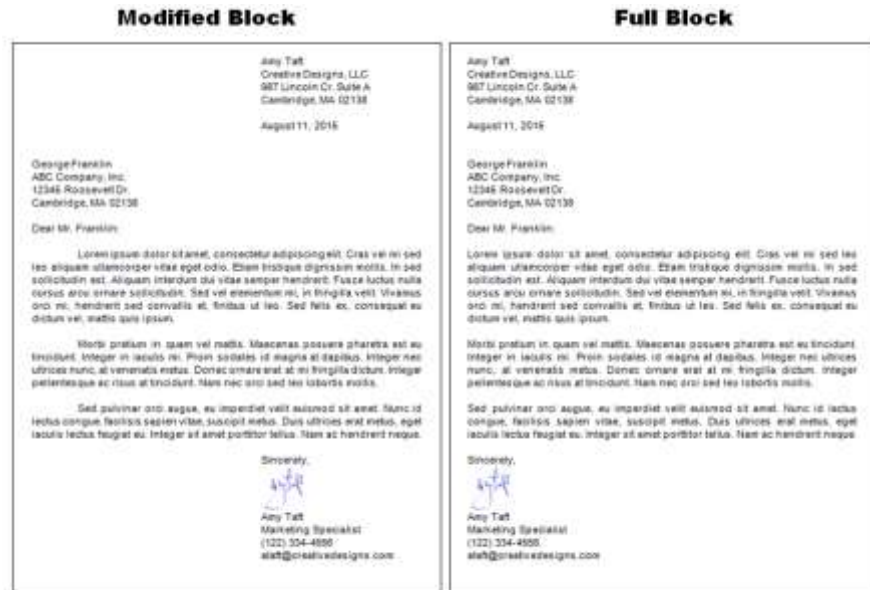


Figure 4: Modified Block and Full Block Letter Format

Modified block format (left) aligns the sender’s address, the date, and the closing with the center of the page; additionally, paragraphs are indented. Many writers use this format when printing on company letterhead. Full block format (right) aligns everything along the left margin, with no indentation and a full line of space between each paragraph.

Styling a Letter

To support readers in effectively reading a letter, you should:

- Choose the best organizational approach to reflect the content of the message.
 - A **direct approach** suits positive and routine messages that readers will easily accept and/or expect.
 - An **indirect approach** suits complex, negative and/or sensitive routine messages whose content readers might find unpleasant or unexpected.
- Establish a professional yet courteous tone. Treat your readers as individuals and respect their time: provide only pertinent information and clear cues on how to use it.
- Maintain confidentiality by acknowledging when there is more than one recipient to a letter and not sharing letters with readers who are not part of the intended audience.

Activities

1. Contact someone already working in your field and ask to them to share an example or two of the types of correspondence they are typically asked to write as part of their job. What tips can they offer about those routine messages?

Emails

2. Send a professional email to your instructor sharing your career goals.

3. With at least one other classmate, preferably one in the same field, draft an email to high ranking person in your industry requesting an informational interview. Workshop that draft with another group in order to test its effectiveness.

Memos

4. Write a memo to your instructor that explains your relationship with writing and your goals for the course.

Letters

5. Find an example of a professionally written letter and analyze its effectiveness based on the strategies discussed in this chapter.

Brief Proposals and Reports

In this section, we're going to talk about brief, or routine, proposals and reports. We've grouped them together because of the similarities the two genres have in form. However, in purpose, they are fairly distinct.

Proposals are persuasive documents that aim to convince others to take specific action(s). A proposal may convince a supervisor to approve a project or convince someone to implement an idea. They may even convince a reader to buy something.

Reports, on the other hand, are informative documents that simply aim to share information. The end result of a report may be that the audience takes an action, just as they would with a proposal, but a report won't advocate for that action throughout as a proposal would. It saves any recommendations for the end.

Rhetorical Context

A proposal or a report may be written for a number of reasons, and the motivating situation and audience needs determine what genre you write your proposal or report in. Here are some of the formats you may use to construct a proposal or a report:

- Templates
- Correspondence
- Unique Format
- Formal Format

Workplace templates, [correspondence](#), and unique document formats are typically used for short proposals and reports, which run no more than a few pages. A formal format, on the other hand, is a long, detailed document frequently compiled by multiple parties. It's considered formal because it includes formal elements, like a title page and table of contents, to reflect the complexity, length, and/or significance of a project.

The format you use for a report or proposal is flexible so that you can adapt to the situation and audience for which you're writing. Below are some of the considerations for when you might use each format.

Templates

If you're writing something that is regularly communicated, your workplace may have a form to increase the efficiency of those communications and to prevent miscommunication. Templates are especially common in larger companies or in industries that are heavily regulated.

For example, companies that conduct work with safety hazards (food processing, construction, aviation, etc.) often have *incident reports* that employees can fill out to notify supervisors of improper procedure, machine malfunctions, injuries, or damage to property.

Another common form you may encounter is a *purchase request*. A purchase request is a kind of proposal that seeks to convince your workplace to buy something. In order to persuade, these templates include spaces where you are expected to provide a justification for the purchase. If you convince your readers, they'll buy what you request.

If you work somewhere with a culture that may appreciate templates, you can show initiative by creating or modifying a form to improve communication.

Correspondence

Many workplace proposals and reports are communicated through correspondence: emails, memos, and letters. These templates of communication work for every day, small-scale reports and proposals. Please refer to the [section on correspondence](#) for more information on how to choose the appropriate form of correspondence for your purpose.

Sales letters are one common example of a proposal in correspondence form. Progress reports are another example; they often appear in either [email](#) or [memo](#) form.

Unique Format

This “format” is vague because it’s one that you design yourself. You can simply put a title at the top of a document that indicates it is a report or a proposal without using any specific genre requirements, or you can merge the report and proposal form with any number of other genres, adapting content conventions to fit your particular rhetorical context.

Technically, a form is a unique document format because the design is so flexible.

More and more often, people are also creating reports and proposals formatted as a web page or a site. There are many sites on the internet in which a single page is a report to the public, and there are whole sites which are basically a long, detailed report. You may also produce brochures that act as informal proposals or reports.

Proposal Conventions

Proposal conventions vary a bit by the purpose. Remember that the underlying purpose of a proposal is to communicate what a reader may gain by favorably responding to your proposed action, whether that action is to make a change in policy or to grant permission to pursue a project. You will adapt your proposals, i.e. in organization and tone/style, to the kind of action you are proposing be taken. Some of the most common types of proposals are:

Solution or Improvement—this type of proposal advocates for implementation of an idea, such as a plan for implementing a change to solve a problem or make an improvement.

Research—this type of proposal requests approval to conduct research or requests funding for research. It is often targeted toward supervisors who must approve your use of time and resources to conduct research. Or, such proposals target readers outside your department or organization that may grant money for projects that align with their interests.

Sales—this type of proposal persuades someone to buy a product or a service.

While the purposes and lengths of proposals can vary widely, the basic conventions are fairly consistent.

Introduction

The introduction to a proposal or report is like any document: it should define the purpose and scope of the document and provide any necessary background information that the reader may need to make sense of the upcoming sections.

In a long, complex proposal you may need to break the introduction up into multiple sections. For example, in a long, formal proposal the background section might be separate and distinct from the introduction. The Report Conventions section has further detail on how an introduction might be broken up into easily useable chunks.

Situation Description

One of the most important elements of any proposal is a description of the situation that motivated the proposal. This section can define a problem, opportunity, or need. This section plays a significant role in convincing readers that taking action can benefit them because it defines the current situation in contrast to the impact of the potential changes.

The situation description is often the most important and the most detailed section in a proposal. Why? Because in order to persuade someone that your idea to address a situation is the best idea, you must first convince them that there is a situation at all! You can't assume that your reader will either be aware of the situation or agree that it is a situation-that-needs-to-be-fixed, and so you must first lay the foundation with which to support your proposed solution.

Plan of Action

The plan of action is exactly what it sounds like. It's a section where you define the steps to complete the action for which you're advocating.

Solution or Improvement—explain the process for implementing the new idea.

Research—explain how you will complete the anticipated necessary research.

Sales—explain how they can buy the product or service.

The plan of action section often begins with general *objectives* of the plan. Then it follows with the *tasks or steps* that should be taken to accomplish those objectives. You can also include a *description of the end result* that would occur if the action were taken. Your audience will be persuaded to take action if the objectives are meaningful, the tasks feasible, and the end result valuable. Remember that the value of that end result must match the needs of the audience, not necessarily yours as the writer.

When you're advocating for implementing a solution or improvement, this is often the most detailed and heavily researched section.

Questions and Concerns: Know Your Audience

In order to be persuasive, you should anticipate concerns or skepticism your audience will have about the plan, especially regarding things that may make them resistant to implementing or approving the plan. Will they be most concerned with cost, timing, or something else?

You should create a section to address and respond to any of the likely questions or concerns that remain after the plan is shared. The most common sections that adhere to this convention are *cost*, *timing/schedule*, and *qualifications* (which refers to the writer's qualifications and credibility), but any number of other questions and concerns are possible depending upon the topic.

Conclusion

In the conclusion you should reaffirm the need for your plan and induce the audience to act. Make sure you explicitly ask for your audience to take the desired action instead of just rehashing the need for the

action. Encourage your audience to act using a confident and direct style that clearly says what needs to be done.

Report Conventions

As with proposals, report conventions vary by purpose. All reports aim to inform the audience on a topic, yet what typically distinguishes reports from each other is how the information is analyzed. Some of the most common types of analysis are:

Feasibility—this type of report seeks to evaluate how realistic an idea might be, and/or if it would be possible to implement. If you conduct a market analysis to see if a new business is viable, the resulting report is a feasibility report to share your findings.

Comparison—this type of report compares options to help a decision maker choose the best one. If the company you work for needs to replace an expensive piece of technology, you might research and compare new options and write a report so your boss can quickly choose the best one.

Cause—this type of report evaluates what's causing a particular effect in the workplace. If you're noticing a high employee turnover rate, you might evaluate causes and make a recommendation for a change.

Impact—this type of report evaluates the effects of something. If you recently implemented a change, you might research the effects it's having on your workplace to make sure there aren't unintended consequences and that it's providing the desired benefits.

You're not restricted to only one type of analysis in any one report, though shorter reports often focus on only one type. You will also find that most long reports are really a collection of many shorter reports, each with a different analytical focus.

Introduction

As with all other introductions, a report introduction should make clear the *purpose* and the *scope* of the report, providing any necessary *context* to help the reader understand what motivated the production of the report (so they know why they're reading it). The goal of the introduction is to orient readers to the situation that prompted the report.

For example, if the report is the product of a research project for which a proposal was written, the introduction might summarize the proposal content so that others who did not read the proposal know the background of the project.

Keep in mind that for longer, formal reports, the introduction may take several paragraphs and you may even find the introduction is broken into several distinct sections. Here are some sections that you might consider using in an introduction (you are unlikely to use all of these at once):

- **Purpose**—Describe the topic and define the function the report serves.
- **Overview or Scope**—Define what information the report covers in brief. This helps readers set realistic expectations—they won't expect content you had no intentions of providing.
- **Background**—Explain the context or situation that motivated the report, typically a problem or issue.

- **Methods or Criteria**—Explain the standards or methods of evaluation used to form conclusions and on which to issue recommendations.
- **Limitations**—Inform the reader of factors that weaken the authority of the report. For example, if you requested pricing information on a product and didn't hear back by the time your report was due, you might acknowledge that that your cost analysis is incomplete or only a rough estimate.
- **Definitions**—Define key terms for the reader. If there are more than five, use a glossary.

While you may need several sections, you should still aim to engage the audience and provide the necessary background as briefly as possible—give them what's necessary for clarity, rather than a history lesson. Reserve detail for later sections.

Analysis

In the analysis section(s) you will share your findings (relevant information you've found) and interpret those findings. An interpretation is an analysis where you piece your findings together to form new conclusions. In business writing, the interpretations are the most important element.

There is no fixed form for analysis—you need to come up with a form that meets the needs of your audience. Your goal is a document that is easily useable by the audience, so you should form your sections around the criteria your audience will use to make their decisions.

For example, let's say you are volunteering with a non-profit that needs to find a new desktop publishing software for publishing their quarterly newsletter. You know their budget is \$100 but they would prefer a free option. You also know they have high turnover in volunteers who compile the newsletter, so they need publishing software that is easy to learn and use and also that has readily available IT support.

Based on these audience needs, the criteria for analysis are cost, usability, and availability of support. As a result, you would make sure to include a section analyzing cost of options that fit within the budget, another analyzing usability of those same options, and a third analyzing the availability of support for each.

In the scenario above, your cost section would share the costs of the options reviewed (findings) and a statement making clear which option is the cheapest (interpretation). In a report, which is informative, keep your interpretations and conclusions focused on local content within the section—as the example above does. Save the final recommendations (like which software option should be purchased) for the recommendations section at the end of the report. You should not offer a final conclusion or recommendation until you have evaluated each criteria separately.

Conclusion

The conclusions section is a summary of the major findings and interpretations. Because many readers may skip to the conclusion to find out the results of your work, trying to save themselves time, this needs to be a concise and informative section that allows readers to avoid reading the full report if possible. Make sure you answer the questions that originally sparked the production of the report. There shouldn't be any new information in this section.

Recommendations

If your readers will want to use your report to make a decision or make a plan of action, you will include a recommendations section at the very end that details the next steps that should be taken as a result of the information you gathered and analyzed.

You may recommend that they buy a particular product or that they carry out a particular procedure. Audiences appreciate conciseness in recommendations so that they can implement quickly and easily. If your recommendations are brief (a few sentences), you may be able to combine them with the conclusions in a “Conclusions and Recommendations” section.

Activities

Brief Proposals

1. With a partner or small group, brainstorm a list of routine issues on campus—parking, Wifi access, etc.—that could be addressed in a brief proposal. Choose the strongest idea and, as a team, begin planning your document by determining:
 - Its rhetorical context,
 - The information needed to sufficiently meet the rhetorical context,
 - Your research goals.

With your plan in place, complete the necessary research and use it to draft the proposal. Use class time to workshop those drafts, testing for overall persuasiveness, strong audience awareness, and general document professionalism. Your instructor will guide your process through in-and-out of class work.

Brief Reports

2. Interview someone in your chosen career field about a typical week’s experiences. Write a brief report to your instructor that describes your findings, reaches an analytical conclusion, and offers any necessary recommendations.
3. Write a feasibility report as a follow-up to the brief proposal activity. What writing strategies do you now have to employ in order to fulfill a new purpose?
4. Kansas State University opened its parking garage in the spring of 2010. Either individually or in small groups, as directed by your instructor, write an impact report that seeks to follow-up on this action.

Public Genres

In this chapter, we use the term “genre” generally in order to discuss a significant aspect of workplace writing: how to write for a public audience.

Web Writing

Web writing isn’t a genre, but a medium for presenting writing. As a result, the conventions are flexible and can be adapted to any purpose. If your goals for a web page are similar to that of a particular print genre, you should borrow from the print genre conventions.

For example, many websites are for promotional, marketing purposes, so they apply strategies you might see in a brochure. A blog, however, may apply conventions of a newsletter because it’s trying to communicate current information on a number of narrow but loosely related topics.

So why talk about web writing at all? Readers use and read electronic and web documents differently than they use and read print documents, so web writing has some unique organizational principles to apply and some additional elements that need to be included.

Rhetorical Context

Most sites are designed to meet the needs of numerous audiences for numerous purposes, so planning for a website needs to be thorough. If you plan well, you can create a site organization that supports readers in easily navigating to the information they need.

Two of the most common audiences for websites are customers and potential employees, but you may also find that a site targets business partners, donors, regulators, and more.

For example, if you run a business that develops gourmet kitchen supplies, you may find that people visit your site for any number of reasons:

- An independent home goods shop wants to sell your supplies in their store. They may need information on distribution and delivery or your products as well as access to a contact to negotiate a large order.
- An individual consumer wants to buy your silicon whisk because a friend recommended it. They’ll want to access a products page where they can order online.
- An engineering student wants to do an internship with your design team. They’ll primarily want information about your company, recent news and projects, and contact information.
- A local non-profit would like you to sponsor a chili cook-off to raise funds for a nearby soup kitchen. They’ll also want contact information.

All of these people will need different information from your website and they’ll all hope to quickly find it. When you design your site, make sure it includes the following qualities (these qualities are more fully explained throughout this chapter):

- chunked text based on users’ needs;
- clear audience-based navigation;

- easily scannable;
- consistent design and organizational patterns.

With the example audiences in mind, the gourmet kitchen site may use the following main navigation to help each of these users quickly get to what they need:

- “Products” with subsections for the different types of tools available.
- “Wholesale” with subsections on “Contacts,” “Distribution,” and “Ordering.”
- “About” with subsections for “Contact,” “Recent News,” and “Jobs.”

One of the best steps you can take in creating site content is to model your site off other effective sites. Go find similar sites, review their content and structure, and analyze the strengths and weaknesses. This research step can help you to anticipate audiences and generate ideas for how best to meet the needs of your own audiences.

Conventions

Remember, content conventions for a website are often taken from print genres, but organization conventions for websites are more unique. To effectively organize web content you need to think about how the content fits into the larger site structure as well as how it is laid out on a page.

Site Organization

Site organization is based around the most common users’ needs and is made clear through the main navigation (the largest most important links that reappear on every page). Additionally, sites should follow a **general-to-specific** structure, beginning new page levels when greater detail is needed.

There are different types of pages that typically appear at particular levels of depths within a site. Once you’ve read a brief description of each type, you can look at the structure of a multi-level site below.

Page types and levels

- **Home Page**—The home page is the most general page, which acts as an introduction to the site, making clear the overall purpose and linking to the other more detailed sections.
- **Landing Pages**—Landing pages introduce and map out sections, defining the specific focuses and purposes of each section. They’re like home pages for sections of the site.
- **Background Pages**—Background pages are often directly linked from home pages and landing pages. They provide useful history or context. These are pages that help readers to understand who or what is behind the site. The most common background page is an “About” page. These pages are often used by potential employees or customers who care about the philosophy of the companies they buy from.
- **Detail Pages**—Detail pages are the pages that users want to read most. You can have multiple levels of detail pages if the site content is complex enough.
- **Currency Pages**—Currency pages are pages with continuously updated content, designed to bring users back to a site regularly. Blogs are the most common example of a currency page.

Because the content of a currency page is always changing, they often appear at the background level even though they provide detailed information.

Below, you can see a site map for Bill's Computer Gaming, which applies a typical general-to-specific web structure.

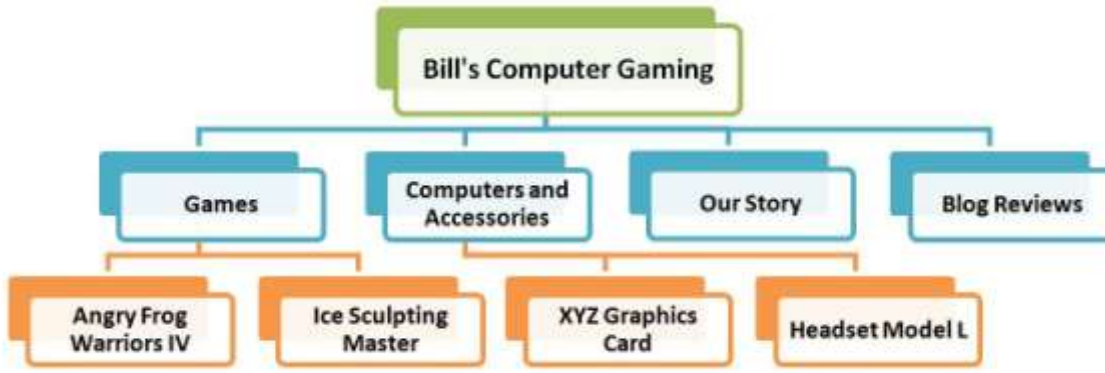


Figure 5: Bill's computer gaming site has a general-to-specific web structure.

In the example for Bill's Computer gaming, you can see a home page at the top. Below that are a background page called "Our Story" and two landing pages "Games" and "Computers and Accessories." Under those two landing pages are detail pages offering information on specific products that fall under either category. The site moves from general to specific with one exception: the blog. The blog page is a currency page, and because its content will always change, it doesn't logically fit within any specific section, so it's placed at the background level.

As you can see from the example, the content needed from a website is very similar to a written document. You still have an introduction, background information, and detailed content organized into user-centered sections. What's different is the organization. *You should start a new page when the content gets more specific, especially if you think the amount of content would overwhelm readers or make use of the content difficult for readers.*

It might seem odd to have important information deeply embedded into a site; however, in a well-designed site, users can quickly click through to detail pages with minimal work. If the navigation is user-centered and links are strategically placed, users should be able to quickly scan for links that will direct them to the detailed information they want. This structure is what allows websites to meet the needs of large general audiences with numerous reading purposes.

The complexity of the site's purposes may also impact its organization. Within an especially large and complex site, each section should be structured as a smaller sub-site with a landing page, background if needed, and detail pages. In contrast, a simple site with a focused purpose may not need a background page or any landing pages if there isn't enough complexity to justify those elements. Like with any document, careful analysis of the needs of your audiences will help you to select appropriate content and organization.

Page Organization

Page organization on a website applies three basic strategies: chunking, selective use of paragraphs, and the reverse pyramid.

Chunking

Because readers scan most web pages, you should apply chunking strategies more liberally than you do when writing a print text. The smaller the content block, the more easily readers can scan the page.

- Use bullets or numbered lists
- Use clear, quickly visible headings
- Keep paragraphs to 1-2 sentences if possible, and definitely 4 sentences or less.
- Use columns (narrow visual blocks are easier to scan than long lines)
- Break up text with images

Chunking is especially important on landing pages where readers are often skimming for links that will direct them to detail pages that meet their individual needs.

Choosing to use paragraphs

While bullets and super short paragraphs are typically preferred on the web, there are cases where you might want to write longer paragraphs—ask yourself, *how patient is my audience?* and *did my reader come with specific questions?* If your readers will want to read a page from start to finish because they want general knowledge and don't have specific questions they're looking to answer, then use paragraphs. If they will want to selectively read to answer specific questions, aim for bullets, short paragraphs, or a table that can be quickly scanned.

On a site selling computer graphics cards, you might have a less patient audience. Readers would arrive at the specific detail pages looking to make a decision about what to purchase, and they'll want to read selectively based on their own criteria. One customer may be looking to choose based on cost, while another may choose based on memory bandwidth—both need to be able to quickly scan the page for the specifications they care about.

However, on that same site, if you're writing a blog review of the most recent computer game released, you may want to write a more lengthy description of what it was like playing the game. Your readers aren't likely to have any particular questions in mind, and they are likely to be patient. They would want to know as much as they can about the game, so you can use paragraphs because you know they'll read from start to finish.

Using the reverse pyramid for detailed content

The reverse pyramid is a structure based on order of importance. In a reverse pyramid structure, you put the most important and essential information at the top so that if readers stop reading early, they will still understand the main message and points.

The reverse pyramid structure originated in journalism to communicate news. It allows readers to grasp a basic story so they can choose to keep reading for less essential details if it interests them, or they can move on to another story. The reverse pyramid logically transferred to web writing because people often follow links, clicking away from content. Additionally, many readers find screen reading fatiguing

and stop reading more quickly than they do with print. Using the reverse pyramid accounts for this increased tendency to stop reading before the end.

Site Elements

In addition to considering different organizational strategies for web writing, there are some basic elements that all sites need:

- Keywords
- Links
- Alternate Text
- Breadcrumbs
- Main Navigation

Keywords, links, and navigation are the things you will need to consider any time you write content for a site page. Breadcrumbs and main navigation are dependent upon the larger site structure, and your ability to control them will depend on your authority over the whole site. If you're only providing content for a single page, you'll want to name your page well to assure effective breadcrumbs, but you won't need to consider the main navigation at all.

Keywords

Keywords are incorporated in the text of your site, and they are designed to help users find needed content through searches. As a web writer, you want to make sure any likely search terms appear in your content so that search engines bring users to your page and so that your site's search engine is producing helpful results.

For example, if you're writing a brief description for the product page of a game that Bill's Computer Gaming is about to start selling, you need to include the likely search terms:

- Ineffective Keywords—The game's newest edition is a rare treat with realistic graphics and a soundtrack that quickly absorbs you into the world of the game.
- Effective Keywords—*Frog Warrior IV*, the newest version of the *ABC Games* classic, is a rare treat with *first-person-shooter* perspective of a *realistically animated* world. The game includes a dynamic *orchestral-rock* soundtrack, varied to each new setting, which helps players to quickly absorb into the world of the game.

It's often helpful to write a list of keywords and then double-check that your text includes all of them. Precision in language is important in all professional writing, but it's doubly important in electronic mediums where users rely on searches.

Links

Links are another essential element in an effective site. Connecting content in your site through links helps audiences navigate to what they need as easily as possible through a number of different pathways. They also help you to keep your page free of content that might be non-essential to some readers. Links can help maintain page focus by allowing you to house extra information on separate

pages. If you introduce a concept that may be unfamiliar to some of your readers but not all, you can link to an explanation on a separate page or to a separate site.

A link to another site outside of yours is called an outside link. In the workplace, it is really important to know your employer's policy about outside links before you create any. Also, linking to outside sites can be seen as an endorsement for the people, mission, or other content on the site you link to. Many companies and government agencies ban outside links or have heavy restrictions in order to protect themselves from negative associations. Outside links can easily break if the other site is removed or rearranged.

Overall, it's important to take the time to go back through any new or revised page and to make sure you create helpful links that increases your audiences' access to other helpful online content.

Alternate Text

Alternate text, or *alt text* for short, is descriptive text that goes with images on a website. When you scroll over an image, the descriptive box of text that appears is the alternate text. You typically write alternate text within the code of the page or through a tool when adding images. It might seem tempting to leave this element out, but it's important for two audiences: those with impaired vision and those with slow internet.

To be compliant with the *Americans with Disabilities Act (ADA)*, your content should be usable by people using screen readers. A screen reader reads all the text for individuals who can't read the text for themselves. In lieu of any images, a screen reader will read the alt text description. Since images are usually helpful for providing context and clarifying ideas, you should provide clear and detailed alt text with any image so that those vision impairment will still have access to that content.

As an added benefit, those with slow internet can read the alt text for any images that fail to load.

Breadcrumbs

Breadcrumbs are links that often appear at the top of the page, showing a user where they are within a site, in case the user got to the page indirectly from an outside link, rather than through standard navigation. They help readers to move backwards in a site structure.

For example, you might search for graphics cards, and the search engine brings you a link to the XYZ Graphics Card sold through Bill's Computer Gaming. You got to that page without using any of the main navigation in the site, but the breadcrumbs will show you "Home > Computers and Accessories > XYZ Graphics Card." You're starting on the XYZ Graphics Card page, but you really want to see all of their graphics cards, so you might use the breadcrumbs to move up a level to the Computers and Accessories page to see what other options they have.

Because breadcrumbs are usually generated automatically, your biggest concern is to make sure page titles are simple, direct, and clear. That way readers who start their visit to your site on a detail page, rather than the home page, will be able to navigate backwards effectively.

Main Navigation

Main navigation is the consistent navigation that appears on every page, making clear the primary chunks of content available to users of the site. Main navigation is designed to help users quickly get to

the sections they need, and to backtrack when they accomplish one purpose and need to switch sections to accomplish another.

As a rule of thumb, you should always try to limit yourself to 10 main navigation items or less. If you have more than 10 main navigation items, your navigation becomes too complex for readers to quickly scan. If you have a large complex site, create secondary navigation under the main navigation to help group your navigation into manageable chunks for your users. It's very similar to the visual hierarchy you might see in a table of contents.

Review

Here are several reminders for when you're writing for the web:

- Thoroughly evaluate the needs of all audiences.
- Review the conventions of print genres with comparable purposes.
- Organize the site from general to specific.
- Organize pages from most to least important information.
- Chunk your content into small manageable blocks.
- Be consistent in your design and organization.
- Include all the web elements: keywords, links, main navigation, breadcrumbs, and alt text.

Press Releases

Press releases are small informative blurbs that share recent and current news from business and non-profits. Press releases are commonly distributed through social media and company websites and are intended for redistribution by the media and other external outlets.

While some of you expect to work in corporate settings that may have separate departments devoted specifically to public writing, many of you may find yourselves in small companies where you may be responsible for communicating public information. Understanding the role of an effective press release and how to write one is beneficial. Press releases were written by a business and then shared with media. Press releases need to be polished enough to pass through an editor's desk.

Brochures

Brochures are small promotional or informative documents ranging from a tri-folded piece of paper to a small collection of pages on a single topic. Typically, they are used to give external audiences information on products or services. Brochures rely on skillful design and use of graphics in addition to quality writing.

Rhetorical Context

Brochures can be written for a range of topics though you can broadly define them as a mix of informative and persuasive content. A brochure on how to use a service at your library might be mostly informative. A brochure about a local cancer support charity might be mostly informative but have persuasive elements to elicit donations. Brochures marketing a new product might be more persuasive but will still need to provide sufficient information to be convincing.

While often used to promote a product or service, brochures can also be used to give information to customers or clients as part of a larger marketing effort. For example, a yoga studio might give new members a brochure detailing basic postures and information on class times.

Given the range of content that can be present in a brochure, you'll want to carefully analyze your purpose and audience before you start crafting your brochure. Once you have a clear sense of your specific purpose and the basic needs of the audience, consider the following questions to help plan an appropriate level of detail and an effective design:

- How interested is my reader in this material?
- How will the material be distributed?
- What role does the brochure play?
- How will the brochure be read?

Knowing the readers' interest level can help you to determine appropriate depth when developing your content and can help you select organizational strategies that suit the engagement levels of different audiences. Understanding how the material will be distributed can help you to consider design choices for your brochure.

Much like with [websites](#), there is a lot of variety in design for brochures. Something that may be very helpful for creating your own designs is to look at brochures you consider effective. Analyze and evaluate their purpose, content, and design to determine what is and is not effective. Such evaluations will help you to generate ideas for your own design.

How interested is my reader in this material?

Brochures are typically written for external audiences, some who are eager for the information, and others who you'll have to entice to take it and read it.

If your reader is eager for the information, you'll want to anticipate their likely questions, and make sure you provide all the information they would want. It's very important to be thorough when you have an eager reader—you don't want to disappoint their expectations.

If your reader is not eager for the information because they don't know why they would need it, you may want to aim for less detailed content. A less dense, skimmable page of content reduces the amount of reader work. They'll feel more open to reading if the document doesn't appear like a burden of reading. Lots of interesting images can also help keep these less interested readers engaged.

How will the material be distributed?

How the brochure will be distributed can have an impact on your design choices.

A brochure that will be placed on display for potential readers to pick up needs to have a large, clear title that makes the purpose of the brochure obvious to readers. This will help interested readers easily find the brochure. A clear and purposeful title may also lure other readers to examine the brochure even though they didn't seek it out. For these uninterested readers, an eye-catching front page can entice readers to pick up the brochure and read it.

For example, if your brochure is likely to be distributed by hand or displayed on a small stand, potential readers will almost always see the cover of the brochure first. If a brochure is going to be laying flat on a

table or in another situation where the material could be flipped over by people passing by, you may want to make both the front and back visually appealing.

What role does the brochure play?

Usually a brochure is part of a larger communication or marketing effort and will provide readers with a means of getting more information or access to the product or service being discussed. This might be a website, phone number, or other means of contact. It might even include an address and location hours if the purpose is to entice readers to visit.

How will the brochure be read?

There are a variety of designs for brochures to meet the various purposes they serve. Some are multiple pages while others are a single page. Some single page brochures are folded in different ways.

To effectively reach your audience, you should carefully consider how much space you need and how best to break up your content using panels or pages. It may seem old-fashioned, but creating a blank version by folding or stapling some paper can help you visualize how a reader is going to navigate your brochure. Knowing how they are likely to navigate will help you know where to place key information when planning your layout and making design choices.

Also, while interested readers are likely to skim through the whole brochure, your design should draw in less interested readers. For all readers, your design choices need to help draw attention to key information. White space, headings, lines, colors, lists and many other design elements can help emphasize that key information to help readers easily access what's important and draw them into the document. If the emphasized details engage readers, they'll be more likely to read the rest of the brochure.

Conventions

Brochures should make use of design elements and graphics to not only draw reader's attention but also to make for a quick and easy read. Typically, space is at a premium with a brochure, particularly with ones made from a single folded sheet of paper, so the language needs to be concise and focused on the reader's needs and interests in relation to the topic. At the same time, you will want to balance use of white space and visuals so the material is not intimidating to readers.

As you produce any brochure, aim for the following features:

- Eye-catching and attractive colors and visuals
- A clear, engaging title
- Design that makes flow of the document clear
- Design that emphasizes key information
- Concentrated content that meets the needs of your reader
- A means for your reader to get more information (e.g. web address or email)
- Clear identification of the organization who produced the brochure

Activities

Web Writing

1. Choose 2-3 different websites for organizations or agencies (your instructor may give you some specific sites for you to pick from) and have a look around the sites. Use the following questions to help you create a profile for each site:
 - Who is visiting the website, and how are they using it? Why are they using it?
 - What sort of prior knowledge as well as interests and attitudes do the designers' assume visitors to have towards the site's content and purpose?
 - What might users be expected to do with the website's content?
 - How much technical knowledge does each site require?
 - Is the information geared towards a broad, multi-cultural audience or a very specialized user? How can you tell?
2. Imagine that you are the gourmet kitchen business owner from our example at the beginning of the chapter, and that you have just established a business relationship with a company in a different country. Choose a country and draft a revision plan for your company's website that will make it more effective for the new audience.

Press Releases

3. Find an example of a press release from a print source, such as a newspaper, and one from a web source, such as a company's homepage. Where are there similarities? Where are there differences? How do you think the writer would explain those choices?

Brochures

4. Gather 2-3 brochures from around campus and your daily life activities (i.e. at the grocery store, gym, health center, etc.) and take notes of their effectiveness based on the conventions discussed in this chapter. Your instructor may have you bring them to class to foster discussion, and/or may have you write a brief report explaining your findings.
5. With a team of classmates, design a brochure around a topic of your choice, and write an audience profile for its intended readers. Bring that work to a class meeting and hold a contest for the most effective brochure creation.

Records/Documentation

You may find yourself frequently having to keep records of the work you complete. These records are sometimes called documentation. While you should consider any workplace document a record that will be kept, there are workplace genres specifically designed for record keeping. This chapter will cover several common forms of recordkeeping and documentation:

- Agendas
- Meeting Minutes
- Logs

These kinds of documents are meant to serve as a record for work that has been done, or in the case of the agenda, what needs to be done. They are informative and generally objective in tone. Internal and external audiences should be able to follow the documents. In short, they should:

- Provide you and other group members with a record of work or decisions.
- Provide outside readers with a clear understanding of events or work.

While some organizations may call these kinds of documents by different names, most places will have some kind of documentation that will serve similar functions to the three described in this chapter.

Rhetorical Context

Companies keep records and other forms of documentation for numerous purposes. Many use records to understand and improve their operations. They may use documentation to assure everyone on a project maintains clear lines of communication or to understand what went wrong or well with a particular project so that they can avoid mistakes and continue effective practices. Others use documentation to assign credit for work done well or blame for problems that arise.

Records and documentation can have a range of audiences. While audiences are typically internal ones such as supervisors or co-workers, some documents may be reviewed by external parties:

- Sometimes workplaces use documentation to meet legal obligations. In the field of aviation, for example, thorough maintenance logs must be kept to show that aircraft are being maintained in compliance with safety standards.
- Documentation can also be used to handle legal disputes. For example, if your company is accused of illegal activity, documentation may be used to defend or condemn the company, or to determine the individuals at fault for any illegal action.

Conventions

While some readers may want to read records or documentation word-for-word, readers will more frequently be looking for specific pieces of information: “What was the deadline we agreed on?” “What is the name of our contact with the client?”

You should make the content skimmable so readers can easily find the information they need. Like with other workplace documents, you should use design features such as white space, headings, and lists to make the document easy to navigate. The writing should also be concise.

Many organizations have internal templates for documentation and records. If they do, be sure to follow the template as that will make interpretation easier for your audiences. If you have no template or example to start from, you can usually develop one based on analysis of the purpose and audiences for the document.

Below are descriptions of three common forms of documentation or record-keeping along with additional features to include.

Agendas

Agendas are planning documents. You will most commonly run into them in relation to meetings. In essence, they are a list of things to do or topics to discuss. You could think of it as a more formal “To Do” list that is shared with others. They can help keep a group on track and prevent overly long meetings.

Agendas differ from the other types of documents in this chapter because they are often written about an upcoming event or meeting, so rather than listing the date it was written, it will list the date of the upcoming event. In the case of meetings, you may even be able to edit the agenda as a starting point for your meeting minutes. Here’s what you do to write an agenda:

- State, clearly, the time, date, and location for the upcoming meeting;
- Provide a list of topics or items to be presented, typically with bullets or numbers;
- Offer a brief description of the topic or item, as necessary.

See [Figure 10](#) in the [Collaboration](#) chapter for a sample agenda.

Meeting Minutes

Meeting minutes, sometimes just called minutes, are records of discussion and decisions made during a meeting. While the minutes do not need to record verbatim everything that was said, they should be sufficiently detailed that a person who wasn’t at the meeting can follow what decisions were made and understand why. The primary focus of meeting minutes is to summarize topics of discussion and to provide a summary of newly assigned and ongoing tasks for group members.

In addition to being concise and skimmable, meeting minutes should include the following elements:

- Date, time, and location of the meeting
- Start and end time of meeting (optional)
- List of people attending
- List of people absent (optional)
- Designated functions of attendees (optional)
- Agenda for the meeting (optional)
- Notes on topics discussed with decisions made and rationale for decisions
- List of topics or agenda points for next meeting (optional)
- Date, time, and location for next meeting (optional)

In some contexts, it might be important to record who contributed which talking points and ideas to any discussion during a meeting. A supervisor may use meeting minutes to recognize employees who put in more effort than their colleagues, or if the company is forced to downsize a supervisor may decide who

to layoff based on contributions to collaborative work. Recording contributors along with contributions can also make it clear who needs to take responsibility if a problem arises.

See sample meeting minutes.

Logs

Logs are records composed of individual entries that generally accrue over time. Your company may ask you to keep a log of hours worked on particular projects and a list of the tasks you completed so that they can send an itemized bill to a client for your time. They may also ask you to log your tasks and hours as part of a system for workplace evaluations and efficiency planning.

Logs that are frequently used in a company may have a prescribed form for users to fill in. In some cases, though, you may have to come up with your own formatting. Some common features of logs include:

- Date (and possibly time)
- Entry notes—these details are dependent on the purpose of the log
- Name of the person creating the entry
- Explanation of the purpose of the log (optional)
- Instructions on how to complete the log and what kind of information to include (optional)

Log entries may be very brief or include a large amount of information depending on the purpose of the log. A log tracking travel expenses such as fuel and food might include itemized costs along with a brief description of each purchase. It might also include a record of miles traveled.

Some employees choose to voluntarily keep logs of their work because they help one to self-assess productivity, and they can be used to communicate work to supervisors quickly and easily. Many supervisors will appreciate the existence of such documents if they ever have questions about what you've been doing. While it's difficult to think about, such logs can also protect you if an office conflict or legal battle arises.

Research Logs

When you are tasked with a larger research project, taking the time record your research process can be helpful. If this step seems tedious, we encourage you to think about the scope of your document. It may not be important to record sources for a smaller document like an in-house memo, but longer projects involving a larger body of research can quickly become cumbersome. In these instances, taking a couple minutes to create a research log where you can record what information you find can save you a lot of time in the long run.

Research Log

Aging Workforce—is an issue in the HR field due to the HR department accommodating those older workers, who are entering and leaving the workplace. The workforce is getting older and companies are trying to find ways to consume the knowledge these workers have. Many workers ready to retire have been with companies for quite some time and now the companies (HR) have to find a way to keep that knowledge within their company. While on the other side

some older workers are just entering or reentering the workforce, in which employers must accommodate to these workers as well.

Source 1—SHRM

This is the top source I will utilize. They have information regarding all aspects of HR. However, information regarding other aspects of companies aren't as readily available on this site. SHRM will ensure that I am utilizing reliable information due to the credibility of the society.

Source 2—DOL

The U.S. Department of Labor will be a great source due to the number of pdf files available to be viewed and read through their website. They have more of a statistics side to the issue that I will be able to analyze, which will be very beneficial to my research.

Source 3—NY Times

This source will help gather information from more of an educated and "reader" level standard. It will help me understand what the public knowledge of the issue is and how they are being educated on it through the news they read/hear.

Are there specific "holes" in your understanding of the issue?

I don't see any holes in my understanding, however it is easy to misconstrue some information to match your own thoughts so I will need to be proactive in not allowing this to happen.

What is common knowledge, and what will you need to address using research?

Common knowledge is the basic human needs when it pertains to their job and age, I will need to research on the ways to be proactive to help accommodate these older workers. Common knowledge is also that the workforce of older workers ready to retire is increasing, but research will show the number of older workers entering the workforce is increasing as well.

Why does this issue merit your time and energy?

This issue merits my time because it will more than likely be something I deal with daily once I graduate and move onto my career.

Make an assessment of the research landscape: how much information is there? Is there enough to complete your research? Is there so much that your research will be unnecessarily challenging?

There will be enough information out there to find however I think I will have to decipher what is opinion and fact through some sources. It will be important to use the correct information. The amount of opinion information available will be my greatest hurdle to get over.

Analyze the initial scope of your topic issue: how can you narrow your focus?

To narrow my topic I could either choose to focus on the hiring of older workers or the retirement/knowledge retention of older workers, both of which will have enough information.

Figure 6: Sample Research Log

Taking the time to step back and analyze a few sources as well as your overall topic ensures you are heading in the right direction. Better to confirm early on that you in fact have a viable topic that meets the needs and expectations of your reader(s) than to invest a great deal of time and resources in

researching only to find the research and/or topic are not going to work. Look at the following research plan and notice how this document helps to ensure the writer is off to a solid start.

Activities

Meeting Minutes and Agenda

1. Find 2-3 examples of both meeting minutes as well as 2-3 sample agendas. You can pull these examples from your place of work, an organization or committee you are/were a part of, or look online for sample. Look closely at each document. What are the main features of an agenda? Why and how would these features/components be useful when working with others? Now ask the same two questions for the meeting minutes. Bring your responses to class.

Research Log

2. As part of a longer project, evaluate the credibility of sources by creating a research log. Before starting, talk with your instructor and determine whether your research log should be formatted as a journal, a chart, or another style. Your log should do the following:
 - a. Indicate the date you did the research
 - b. Cite the source (a link alone is not a complete and proper citation)
 - c. Summarize the main points of the source
 - d. Indicate how the source is relevant to your project
 - e. Evaluate the credibility of your sources

Policies, Procedures, and Instructions

Policies, procedures, and instructions are documents that help readers follow a course of action by defining a process or rules for certain elements of a process. Workplaces use these genres to standardize information and operation. Often, this is in an effort to increase workplace efficiency and consistency.

Policies are sometimes also called Standards of Procedure, Policy Procedures, Standard Work, or Workflow in different organizations. No matter the name, the purpose is the same. They define an organization's perspective regarding a topic or course of action. Policies are broad in scope and are often accompanied by procedures. For example, a policy for a bus company might state that the morning driver has to perform a brake check before taking a bus on a route.

Procedures are an official process for completing a task—there may be more than one way of completing a task, but the company will write a procedure if they prefer one particular process. Procedures merge elements of instructions with elements of policy. Procedures are narrower in scope than policies, giving more specific direction on what actions can be taken under certain circumstances. A procedure for performing a brake check might say what to do in response to a pass or fail on the check. For specific steps on executing a task or duty, procedures usually refer to instructions.

Instructions are detailed directions for completing a task, typically designed to guide the reader through a process by breaking it down into small manageable steps. If the bus doesn't pass a brake check, the procedure might refer to specific instructions on how to contact maintenance.

Simply put, *policies* are the formal rules, *procedures* state generally how to follow the rules, and *instructions* give specifics on performing a task.

Rhetorical Context

In a workplace setting, policies, procedures, and instructions are generally written to assure quality standards and prevent issues or conflicts by assuring consistency in workplace processes. They are also a means of reducing workplace hazards. Frequently, they are written in response to a need or problem.

Audiences for these kinds of documents vary from experts to the general public based on the purpose of the document and the needs of the organization. Depending on the type of organization, internal policies and procedures may also be made available to outside audiences with an interest in how the business is run. Some policies may be written specifically with outside audiences in mind. Privacy policies or return policies for merchandise are some common examples. Others may be confidential and written for expert audiences, using more specialized language as a result. The team charter detailed in the [collaboration chapter](#) is a form of an internal set of policies and procedures for a small group that has to be understood by the group members and a supervisor.

Most *policies* and *procedures* are written for internal audiences, guiding employees on how an organization functions and on how to perform a task related to the workplace. While policies give the organization's position related to the topic, the procedures direct readers to certain actions related to the policy and relevant instructions on performing the actions.

Instructions are written for both internal and external audiences. Because instructions are designed to simplify a process, they can be helpful to anyone needing to complete a task. In some cases, instructions

may need to be understood even if the person is not able to read them. This is more common when writing instructions for an external audience. These kinds of instructions rely heavily on images and design features to communicate key information. Operation or assembly instructions for consumer products often take this approach.

Context Example 1: Customer Service

Let's consider policy, procedure, and instruction in relation to customer service at a spatula outlet store. A customer approaches an employee, who happens to be new, about a particular spatula. The customer likes the spatula, but doesn't like the colors available. The employee, Al, has read the customer service policies and knows that he is supposed to make sure the customer is completely happy with his or her spatula choice (broad scope). The related procedures for handling customer concerns has an entry specifically about a customer wanting a different color or feature that instructs Al to offer to search the inventory catalog for what the customer wants and to allow the customer to view product images to feel more involved in the process. The procedural document also states that if the employee can't find what the customer wants, that the employee is authorized to offer a 10% discount on a spatula that is similar to what the customer wants. The procedures refer back to related policies as justification for these actions, but also reference instructions that will guide Al through using the inventory catalog or applying a discount.

The policy gives broad guidance on what the company's perspective on customer relations. The related procedure provides the employee with an accepted path to follow to perform his or her duties related to the policy. The procedure also guides the employee to instructions on how to perform specific tasks.

Context Example 2: Paid Leave

Let's consider another example: medical leave and paid vacation time. A policy will state the company's position regarding both types of leave (why they are offered to employees) along with definitions of each and descriptions of how an employee earns each. It may also discuss limits on earned leave or exceptions to being able to take leave. An accountant's office, for example, might not allow vacation time during their busy season in March and April.

The related procedure for paid vacation time will detail what forms (if any) you need to fill out to request time off and who to send the information to for approval or notification. That procedure might reference or include instructions on how to access and/or complete the form, though the instructions may simply be included on the form instead.

Distribution

Policies, procedures, and instructions can be distributed in a number of forms including: bound manuals, memos, emails, brochures, posters, or websites. Government, industry, or department regulations may require notifications or updates of policy and procedure in a specific form and that may influence how you distribute your information.

Policies are generally formally distributed. While they were once primarily distributed in a bound volume, they are more frequently available electronically on secure intranet sites in a company to simplify referencing and updating the information. As policies are frequently accompanied by procedure and sometimes instructions, chances are high that you will encounter them in this form.

A new department policy on e-cigs might be first distributed by email or memo while policies on earning and spending vacation time might be part of an intranet based employee handbook. Knowing what forms you're likely to use for distribution will help you determine your approach.

Review and Revision

While performance issues or other influences can prompt revision or creation of policies, procedures, and instructions, they are sometimes reviewed and updated after a certain amount of time. For example, safety policies might be updated in response to accidents or new regulations, but may also undergo an annual review that could prompt further revisions.

Conventions

An organization will often have a style guide or manual to ensure consistent structure in writing policies and procedures—this more common with larger organizations. Always check for one before you begin writing. If you cannot find a style guide, look at previously written documents of the same type and model after them.

Policies, procedures, and instructions need to be understood by all intended readers. If the document is meant for a specialized audience, jargon and specialized terminology is permissible. In such cases, specialized terms will still be defined in a glossary or in the policy.

In some cases, though, you will need to write for an audience with a range of knowledge. In those cases, clarity and accessibility are particularly important features. Avoid or define any jargon. Use simple, clear language as much as possible instead of excessively formal language or legalize.

As with most writing situations, you should carefully analyze your audiences as part of creating the documents.

Policies

Policies are a means for communicating official perspectives and preferred courses of action on a topic. It might be easier to think of policies as formal and visible rules or guidelines. Policies may detail sanctions or consequences for instances of not following them. For example, a policy on dress code might discuss penalties faced by employees who do not follow it.

Policies are frequently accompanied by procedures. An employee handbook might include policies on things like medical leave, paid leave, and travel reimbursement. With medical leave as an example, a policy would define what constitutes medical leave, how much is available, how it is earned, and when it can be used. It might be accompanied by a procedure on how to use medical leave.

Policies often include some of the following information:

- Policy number (optional)
- Effective and revised dates (optional)
- Title
- Rationale/purpose
- Standards
- Scope—who the policy applies to

- Consequences (optional)
- Relevant contact information (optional)
- Definitions or glossary reference (optional)
- Appendices dividing responsibilities by group or department (optional)

Procedures

Frequently, procedures accompany related policies as additional support. While the policies give the position or value an organization holds on a topic, procedures provide guidance on how to perform an action related to the policy.

For example, a company policy on ethical behavior might have a procedure for determining if an action can be ethically pursued.

Procedures may also appear on their own. A construction company may have policies and procedures in its handbook about meeting safety standards, but may post just the procedure in visible places on a job site to remind employees to use safety equipment. Or, the company may post instructions for checking safety equipment before entering the site that may include warnings about dangers and consequences.

Procedures typically include the following information:

- Introduction/Scope
- References—Relevant policies, procedures, instructions, or other information (optional)
- Responsibilities/procedure statements
- Samples/Attachments (optional)
- Visual aids (optional)

A procedure may also be represented in the form of a flow chart either as a visual representation of the written procedure or as the procedure itself. In the latter case, it should still cover the information listed above.

Instructions

Instructions provide detailed, step-by-step guidance for completing a task the reader may not be familiar with. They often include visuals that duplicate the information in the writing, particularly for complex steps. Because clarity is a necessity, instructions typically use the imperative mood (“Be quiet” or “Please be quiet”) because it is simple and direct. It’s also common to address the reader (“You need the following materials: ...”). Instructions are often focused on specific, concrete tasks, like using a copy machine or assembling a desk. Another common component in instructions is additional information in the form of cautions, warnings, and notices that are made highly visible to attract reader attention.

Instructions usually include the following information:

- The introduction, providing the purpose and context of the instructions
- The steps, sequentially arranged and often numbered
- Informative headings (optional)
- Visuals (optional)

- Cautions, warnings, or notices (as needed)

Design for Instructions

Because instructions can give very detailed information that may have to be read quickly, elements of design become an important part of making them easily understood. Try to incorporate the following elements when writing instructions.

- Simple design with clearly defined flow
- Visual separation of steps
- Limited content per step to keep information manageable
- Transitions to mark time and sequence so that progress in a process can easily be tracked
- Sequential arrangement (with concurrent steps clearly indicated)
- Layered approach or visual hierarchy to make clear the small steps that compose a larger step (only necessary for long complicated processes)
- Visuals placed near related steps
- Concise and clear sentences
- Direct address, active voice, and imperative mood
- Parallel structure to allow readers to find information quickly
- Affirmative phrasing (tell readers only what should be done, rather than what should “not” be done)

A final reminder for instructions circles back to audience awareness: the more familiar you are with the steps you’re advocating, the harder you’ll need to work at clarifying them for your readers. Be careful not to make assumptions about what they know or will do; this requires careful planning and attention to detail on your part.

Activities

Policies

1. You’re a mid-level manager at a medium-sized company and are tasked with writing a memo announcing a potentially controversial policy change regarding flex time. Complete the necessary planning and research for the memo before crafting a draft. You may work individually or in groups organized by your instructor.
2. Reflect on your own working experiences and write a brief memo to your instructor explaining a particular policy or procedure that you had to be familiar with on the job. To the best of your ability, explain the policy or procedure and the reasoning behind it. Example policy topics include:
 - When to offer a discount or refund to a customer
 - How to respond to a workplace problem or injury
 - Workplace wardrobe requirements

Procedures

3. Using the policy memo you drafted about flex time, create the follow up procedural memo that offers more explanation on how to use it.
4. With a partner, write a procedural memo directed to high school seniors about how to succeed in their first year of college.

Instructions

5. Think of a common task like tying your shoe or filling your car with gas or making a sandwich. How would you create written instructions for that task for an unfamiliar audience, i.e. different nationality or varying literacy levels?
6. Bring to class a set of written instructions and then use the guidelines in this chapter to evaluate their effectiveness. Your instructor may further ask you to then revise them, if possible.

Job Application and Advancement

Let's face it, applying for jobs can be stressful and time consuming. Taking a little time to evaluate the situation and plan your approach can help you to show a company that you're a good fit for both the position and the company culture.

Rhetorical Context

The common purposes for application materials are:

- Introduce yourself to a potential employer and get an interview.
- Convince a potential employer that you can meet the needs/responsibilities of the position.
- Demonstrate your current or future value to the potential employer.
- Make a case for advancement in the company.

Potential employers can learn a lot about the type of employee you'd make by your document and [design](#) choices. For example:

Many people simply send a generic cover letter and résumé in response to a job opening, but if you want to be an effective applicant, you need to respond uniquely to each application situation. Some employers might want a traditional paper résumé, while others will ask you to submit a text-only version of your résumé through their employment website. The only way to know what the audience prefers is to read the job announcement carefully (if responding to an opening) and do any other necessary research in order to familiarize yourself with the company.

If you've secured a position, you may eventually want to advance, transfer to a different department, or argue for a pay raise. You will need to generate application materials in these cases too, though an employer may have additional documents that they want in addition to a résumé and letter.

Basic Application Situations

When you're deciding how to put together an application, you should start with two questions:

- Is the reader expecting an application?
- Have I had prior encounters with the intended reader(s)?

Is the reader expecting an application?

Solicited applications are ones that a company or reader has asked you to send in—they're expecting your application. Note that they don't have to ask you directly for your application—placing an ad for a position is the most common way of soliciting an application.

Unsolicited applications are those where the company or reader is not expecting an application and there is no advertised position. While these kinds of applications are less common, they can be successful if you understand that you have to work a bit harder to persuade the reader that they need to meet you in person for an interview.

You may be less familiar with the idea of an unsolicited application, so consider the following scenario:

You're moving to a new city because of your partner's job. There is a company you'd really like to work for in your new location, but it has no published openings. Sending an unsolicited application to introduce yourself can be a proactive step toward eventually securing a position there.

Have you had prior encounters with the intended reader(s)?

Cold applications are those where you have had no prior contact with the intended reader; they consider you to be a stranger.

Warm applications are those where you have had prior contact with the intended reader; they can consider you at least as an acquaintance.

If your readers already know you, it could improve your chances. Hiring new employees is a lot of work, and hiring someone who is known can seem like a better choice than someone who is unknown—they feel warmer towards you than other candidates.

Simply knowing or speaking to someone at a company doesn't make your application warm. You need to have had contact with the person who would be reading your application; often this is a manager or department leader, someone who has the ability to offer you a job.

The most common form of job application is a response to a job advertisement for a company where you don't know your readers. This is a *cold solicited* application. The company is requesting applications, and that's what makes the application solicited. Since the applicant hasn't spoken to the intended reader and is writing based primarily on the information provided in the advertisement, the application is a cold application.

Application Goals

The goals with application materials may vary slightly depending on the situation, but whether it is an application for a new position or for a promotion, your basic goal is to persuade your audience that you will be a valuable asset. The table below explains the basic strategy for accomplishing those goals within each basic application situation.

	Solicited	Unsolicited
Warm	Ask your contact person about what the company wants if possible. In your application letter, be sure to reference the conversation and the request for you to apply. Focus your materials on how you can meet the needs of the position.	In the application letter, reference past conversations or interactions to help the reader recall you positively. As there is no advertised position, you will also need to research and discover what the reader's needs are and present yourself as a solution to some of those needs.
Cold	Determine the key skills and abilities based on the job advertisement and other research. In your application letter, reference the advertisement and other research, then focus your letter and résumé on how you meet the needs for the position.	You will need to do sufficient background research to show you are familiar with the company and its culture or recent achievements. As there is no advertised position, you will also need to focus your research on discovering what the company's needs are and present yourself as a solution to some of those needs.

Figure 7: Application Strategy by Type

While your purpose in every application situation is to acquire employment, the difference in your relationship with the reader will affect your research strategies and what content you choose to include.

Application Documents

Application Letter

Application letters are a type of cover letter focused on introducing you and your application materials, especially your résumé. An application letter needs to persuasively put your key qualifications into context for the readers, convincing them that you are not only qualified for the position, but a good fit for the company. While the résumé provides a list of experiences and qualifications for the reader, the letter focuses on your key qualifications, and aims to help your readers get to know you. The letter can be a powerful part of your application. Effective application letters generally achieve the following:

- Generate reader interest early in the letter
- Establish the value/benefit that you represent as an employee
- Provide specific examples of your abilities
- Demonstrate your interest in the position is genuine
- Establish a plan for future contact

Résumé

A résumé is basically a list of skills and experiences that demonstrate your history and qualifications. In many fields, and particularly early in your career, a résumé should be kept to one page only, so you'll need to carefully include only the information most relevant to the employer and the position.

Résumés are intended to be quick and easy to navigate to help readers sort through large stacks of them efficiently. Readers don't typically read a résumé in the traditional sense. They will usually scan the document quickly looking for key information. Make the information the reader is looking for easy to find through your page [design](#).

Be sure to include the following standard résumé features:

- Applicant name and contact information
- Objective statement or summary (optional and/or depending on industry preferences)
- A structure that emphasizes key information, such as through headings, bulleted lists, and sentence fragments
- Active verbs to describe skills and qualifications

Many people use static résumés to save time, but if you want to stand out, you should revise your résumé for each position. You can revise by changing out the information and adjusting the organization to better emphasize key experiences and abilities relevant to the position. Make sure to include key terms from the job post in your description; frequently, readers or computer filters will scan for some of those words before a document is read by an actual person.

CV (Curriculum Vitae)

CVs are much like résumés with a few differences you should be aware of.

In the U.S., a curriculum vitae is a much more detailed history of the applicant's experiences. CVs are generally required for positions in academia or medicine and are typically multi-page documents. They should be just as accessible to a reader as a résumé.

CVs have many of the features listed above for a résumé, though you typically will not include an objective statement. While sections should still be concise and the document should maintain a consistent structure, you may include some of the following information on a CV:

- Educational history (may include information on dissertation or thesis)
- Work history (often separated into categories; e.g. teaching, research, etc.)
- Professional affiliations and honors
- Publications, presentations, and similar activities
- Certification or license status (for medical positions, food safety, construction, etc.)
- Research or teaching interests
- Grants or awards secured

In other English-speaking countries outside the U.S., employers often ask for a CV instead of a résumé, but the level of detail may vary depending on the country the employer is based in. In Australia, for example, a CV closely resembles the résumé you would see in the U.S. If you are applying for a position in another country, you will need to do some research to learn what features are considered common for a CV in that country.

Professional Summary

Professional summary is a catch-all term for the kind of self-summary you may find in a general portfolio or in an online profile on sites such as LinkedIn. It is like a cover letter in that its goal is to present you as an asset, but it doesn't have the same kind of focus because it is typically written to a broad audience of people who may happen to look at your profile or portfolio. In most cases, it won't be labeled as "professional summary." In an online profile or portfolio, it might simply be a section labeled "About." While there is a lot of variety in professional summaries, there are some common features:

- Keep it brief (under 500 words)
- Establish the value/benefits that you represent as an employee
- Provide specific examples of your abilities and interests

Portfolio

A portfolio is a collection of documents that provide evidence of your abilities and experiences. Common forms include: hardcopy, an electronic file, and a web page or site. Depending on what you're trying to accomplish, it could take other forms too. A profile will typically include:

- Contact information
- A professional summary or about me
- Samples of work (sometimes with a brief note about each sample)
- Philosophy statement—how you approach your work (optional)

No matter the medium, your portfolio should be:

- Coherent and easy to follow
- Easy to navigate
- Visually engaging

Style Features of Application Documents

Clear, direct, and concise language is important in workplace communication, but it is particularly important when applying for a job. Your readers typically have to balance the review of applications against their other workplace responsibilities, so the more direct, clear, and concise you are, the easier it will be for your audience to understand your message. They'll appreciate this if they solicited applications and have a large stack to read. If it is an unsolicited application, they will be more likely to look at it if they don't think it will take long.

Activities

Researching the Company or Organization

1. Before drafting your application, research the company or organization. Read their website carefully and look for any other sources of news or articles featuring the company/organization and its leadership. Write a brief summary of your findings.

Researching Yourself

2. Perhaps equally important as knowing your audience is knowing yourself in this situation: what kind of job do you want? (60 hour weeks? Flex time? Onsite childcare?) What do you want your daily life to look like? How about your life 5 years from now? Do you see yourself sticking with one company for the duration of your career, or does the possibility of frequent moves, shifts, and changes energize you? Reflecting on questions such as these can help you build stronger application materials, and help you navigate an increasingly diverse and competitive workforce. Employers want employees who are self-aware, astute, and insightful, and your application materials can provide excellent evidence of such capabilities.

Solicited Job Search Materials

3. Find a job posting/ad for which you are qualified. This can be an internship, part-time position or full-time job if you're graduating. Read through the ad carefully and identify the 3-4 key skill areas for which the employer is looking. In a brief message to your instructor, or as an in-class discussion activity, explain why you think these are key skills the position and how you would plan to demonstrate your ability in each of these skill areas. Be specific.

Unsolicited Job Search Materials

4. Imagine that, upon graduation, you have your sights set on a glamorous city far away from Kansas. While you are dutifully applying to every posted job for which you're qualified, there is a company, business, or organization for which you'd love to work and for which you think you'd be perfect fit. Do the necessary research on the company and write an unsolicited application letter explaining

why they should consider you for employment and persuading them to bring you in for an interview. Your instructor may then have you workshop those drafts in order to test for overall effectiveness.

Résumés and CVs

5. Gather a stack of résumés, either on your own or through the help of your instructor, and as a class, analyze the features, design, and content you find effective. Then, based on that analysis, write your own set of guidelines for creating effective résumés.

Professional Summaries

7. If you already have a professional summary posted on LinkedIn, revise it according to the guidelines in this chapter and handbook. If you don't, take the opportunity to draft one, and then have it workshopped by your peers.

Formal Reports and Proposals

Rhetorical Context

The formal format is reserved for either very long documents or for documents that contain formal content, i.e. an annual report or a major proposed change, that must serve the needs of many readers. Readers of formal reports and proposals will likely extend beyond one department, branching out into the company at large, and so must be formatted in a way that helps every possible reader find information pertinent to their specific job. There is a high standard for professionalism for these documents because they represent information that probably took a great deal of time and effort to gather and compile. Attributes of formal format are also used in situations where you want to convey a strong professional image, such as reports for clients or investors.

Here is a list of the elements a formal document may include along with their functions:

Front Matter

- Letter of Transmittal—a letter to the most immediate audience (often a supervisor), indicating the report or proposal is complete and being submitted. Transmittals also provide an overview of the findings.
- Abstract—a summary that offers the highlights from the report, focusing on the main findings, conclusions, and recommendations, intended for all readers.
- Table of Contents—a map to the document that indicates the major sections, helping readers to selectively read what is important to them.
- List(s) of Figures and Tables—a map (or maps) to the important visuals in a text, typically only included if there are five or more visuals.
- List of Abbreviations and Symbols—a key to help readers understand and navigate the document.
- Executive Summary—a summary that provides the highlights from a report or proposal to meet the needs of an executive decision maker. The executive summary should be a brief and precise document that can help an executive to quickly make a decision without reading the entire report or proposal.

Main Text

- Body—the contents from introduction to conclusion (and recommendations). Please see the [Proposal Conventions](#) and the [Report Conventions](#) sections for more detail on what would be included here.

Back Matter

- References—a complete list of works that were cited within the report or proposal. You may also include a separate list of works that were consulted but not cited.
- Appendices—useful attachments or supplements that may offer more detail for the reader. Most often, you will provide raw data in your appendix. For example, if you're evaluating the impact of a new policy on working hours, you might include a copy of the policy in the

appendix for convenient reference. Appendices are also used for large complex graphics that would disrupt flow within a body of a document—like a detailed Excel spreadsheet that takes a full page or more.

- Glossary—a list of definitions, which is typically only necessary if you need to define more than five terms.
- Index—an alphabetical list of all the major topics. This is usually reserved for very large, complex reports with very large audiences.

Depending on the length of the document, and the needs of its readers, you may find that you don't need all of these elements. Think about the function each element serves for your audiences as you decide how to construct your formal document.

Formal Proposals

The main distinction between an informal and formal proposal is likely audience: external readers expect the more extensive, polished formal formatting. That said, content can guide your choice, too, if your topic requires extensive planning, research, and resources. While you aren't likely to need all the conventions listed above, and you should follow your industry guidelines more specifically. Chances are good that your formal proposal will at least include a letter of transmittal as front matter, and all of the necessary back matter components.

Activities

Letters of Transmittal

1. Find a report that you have written, either previously for this class or for another, and write a letter of transmittal that serves to introduce your findings to the primary reader.

Abstracts

2. Refresh your summary writing skills by reading a text, assigned by your instructor or located on your own, and writing a summary that captures the main ideas without getting lost in the details. Bring your summary to class and compare with other students' work. How can we tell which summaries are the most effective and why does that matter?

Executive Summaries

3. We may not be used to thinking of summaries as rhetorical, but executive summaries are just that: summaries for real readers with real, practical needs and expectations. Revise the abstract you wrote previously into a brief text that specifically focuses on the expectations of a reader who needs to make a decision from the summary. What changes did you make and why?

Document Design

Professional writing applies design practices to signal professionalism and to make documents more easily accessible to readers. Effective design can also make a document’s organization more visible, thus emphasizing important content and supporting the overall purpose of the message. Additionally, effective document design can communicate a tone suited to your purpose—formal, creative, dry, i.e.

By the end of this chapter you should be able to:

- Understand and apply basic principles of document design
- Understand how professional design helps readers navigate a document.
- Apply design principles using appropriate digital technologies.

How Readers Navigate a Document

Before discussing design principles, it helps to get a sense of how readers navigate a document so we can understand how design can help or hinder a reader. Readers navigating a document written in English will read from left-to-right and from top-to-bottom unless certain design elements “pull” their eyes elsewhere. On documents like tri-fold brochures where sections (columns) are implied by the folds in the page, readers will tend to move from top to bottom on the leftmost column and then move to the top of the next.

Additionally, workplace documents are often read with limitations on time, and they are also often written for varied workplace audiences with differing needs. In order to accommodate these needs, document design elements like contrast in headings help readers jump to needed information while skipping information that isn’t essential to them.

You can see a few simple design strategies that support organization below.

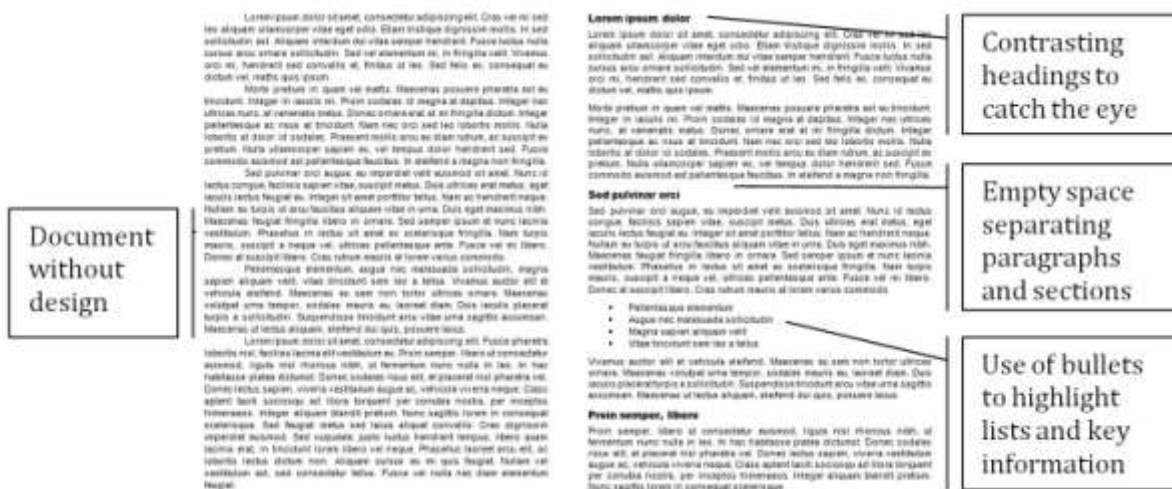


Figure 8: Design practices (right) sorts groups of information into visually distinct blocks, uses contrasting headings, and lists to make information more accessible than paragraph structure alone could make it.

The page structure on the left works well for patient readers—like individuals reading a novel who will read every word. And yet, the page on the left might also seem overwhelming to a reader looking for select information under workplace time constraints.

The structure on the right can help readers to more easily skim headings and topic sentences to quickly find needed information, skimming past information that they don't need but that may be needed by other potential audiences.

We all wish that workplace documents could be kept short to make information easy to find, but that's not often a realistic solution. Some documents, like manuals and formal reports, need to communicate great quantities of information to a multitude of different audiences. Design can help each different audience more effectively use the document.

Principles of Design

When you design your documents, you should apply four basic principles of professional design: contrast, proximity, alignment, and consistency.

- *Contrast* is creating clear visual differences between elements of a document. Elements with contrast draw the eye, so you can use contrast to emphasize important features.
- *Proximity* (also called chunking or grouping) is placing elements close together so that readers know they are related, or moving them farther apart to show they are less related. Leaving empty (or white) space between elements helps readers to recognize chunks of information as distinct.
- *Alignment* is creating a structured visual arrangement and hierarchy that help readers understand the relationship between ideas and the sequence they should be read in.
- *Consistency* (also called repetition) is repeating a design feature continuously throughout the document. Establishing and repeating design patterns can help readers quickly identify familiar features so that they can easily process information. Consistency in design also establishes a sense of professionalism and communicates attention to detail.

Elements that you might manipulate when applying these design principles include:

- Layout: block paragraphs or indented, columns, spacing, alignment
- Typography: font type, font size, font style (bold, italics, etc.)
- Color or transparency

Contrast

In professional writing, contrast or differences are often used to draw attention to important features in a document, like headings, or helpful visuals. Contrast helps readers to see what's important, and it can be an effective way to help busy readers to skim a document or locate important information.

For example, you can help a reader recognize the structure of a document through **headings** so that they may more quickly process the information. It's even easier for a reader to recognize headings if they appear in a contrasting font or color compared to the rest of the document.

To make your headings stand out easily to readers, create contrast between the font style of the body text and the font style of the headings.

1. Pair serif and sans-serif fonts.
2. Bold or italicize your headings.
3. Increase the size of the heading font.
4. Align the heading further left than the body font.

The résumé excerpt below shows a few of these strategies applied to make the main section heading more noticeable.

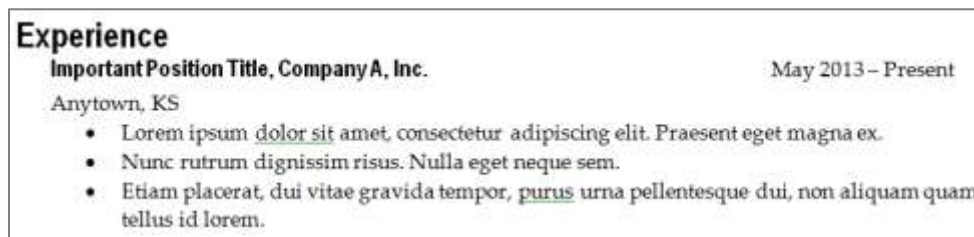


Figure 9: The “Experience” heading in this résumé is offset from the body text using a contrasting sans-serif font, bold style, larger size, and a different alignment.

Using the “Styles” tool to designate your heading levels in Microsoft Word or Google Docs allows you to:

- maintain more consistent and professional document design
- test different styles more easily
- generate a Table of Contents for long documents

You can learn about using the styles tool by searching “styles Microsoft Word” on YouTube.com.

Once you apply effective design to a heading to make sure readers see it, you also want to make sure the language of a heading assures the heading is clear to help readers navigate to the sections most important to them and skip sections they’re less interested in reading.

Writing Accurate Headings

Write and/or revise your headings after you finish writing a section. This assures accuracy, i.e. if you’re writing a procedures manual and you had planned to write a section called “Table Setting Procedure,” but then you also wrote about clearing tables, you would need to rewrite the heading to make clear that the section covered both setting and clearing tables.

Also, to ensure your headings are effective, make sure they are descriptive, parallel, and a reasonable length.

1. Descriptive (not vague, and accurately describes the content)
 - Vague— “Eating Crickets”
 - More Specific— “Raising Crickets for Human Consumption”

2. Parallel in structure
 - Weak—“Market Opportunities,” “Possible Investors,” “What a Location Needs”
 - Better— “Market Analysis,” “Possible Investors,” “Location Requirements”
3. A reasonable length for quick scanning
 - Too Long— “Ways to Raise Crickets and Costs Associated with Each”
 - Better— “Cricket Raising Methods”

In this case, you might create subheadings for each method and a heading under each of those methods called “costs” so that the reader can still see those details upcoming.

Proximity

To help audiences quickly understand how ideas and points relate to one another, you should visually group information, keeping closely related content in close proximity.

You can also chunk content into manageable pieces of information by creating empty space between chunks—that way readers can see each chunk of information as a distinct block. Your chunks of content are groups of information and empty space is how you separate the chunks from each other. You can adjust the empty space to indicate different degrees of relationship between chunks through relative proximity.

In the résumé below, you can see varied degrees of empty space applied to indicate the relationship between chunks of content.

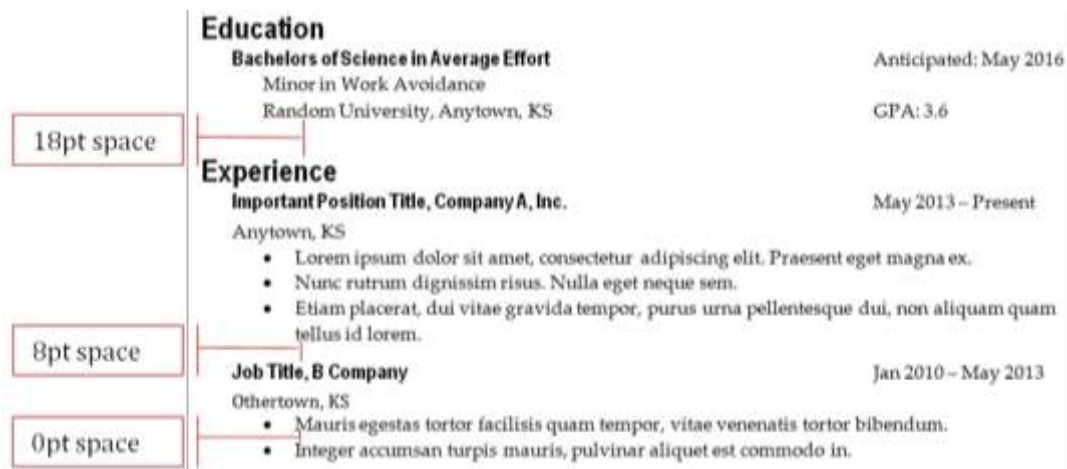


Figure 10: Larger empty spaces are used to separate major sections and smaller empty spaces are used to separate subsections.

How close or far each chunk is visually depends on how related the information is. There is little space between the description bullets because that’s closely related information. Between each position, there is a little more space. Finally, the largest amount of space appears between sections.

When you use empty space to separate paragraphs, it’s called [block paragraph](#) format. This format is common in correspondence and on web pages. It’s the most frequently used formatting structure in

workplace communication because it applies proximity (via empty space) to make each paragraph a visually distinct unit.

Block paragraph format is the default for electronic documents and the web because of the way readers scan electronic documents and the web, and the spaces between paragraphs help readers to mentally sort each paragraph into its own information chunk.

Difference from Writing in School

What many of us think about when writing for school assignments is to use double-spaced paragraphs with an indentation at the start of each paragraph. This is called manuscript format. When printed as a hard copy, it leaves enough space for commenting and marking on the draft—hence its popularity in school settings.

You won't see manuscript format frequently in the workplace unless you work in a specialized area, like publishing, where it is used to revise a work before converting it to a different style for publication.

Alignment

Alignment helps readers to know the order that they should read information, and it helps readers to see the relationships between pieces of information.

In a résumé for example, alignment helps readers to navigate the document. While most of the text is left-aligned, the person's name may be centered. That contrast in alignment helps the name to stand out. Additionally, the content under headings and subheadings is indented, to show it falls under the heading. This is called nesting.

Nesting helps to make a document easy to skim, and is commonly applied to make lists more accessible.

Accessible Lists

Lists are easy to skim, so they're encouraged in professional writing to support the needs of busy readers. Use numbered lists when sequence is important, like with steps within instructions. Use bullets when sequence is not essential, and try to arrange your information by order of importance or hierarchy.

Additionally, you should be very careful to make sure your lists are *parallel*. A parallel list uses consistent structure from one item to the next. Repeating the structure helps readers to absorb the information more readily.

For example, in a résumé job descriptions are nested under the position and company name to make clear they are a subset of information. Additionally, these descriptors are formed into a list and each typically starts with a verb (or action) in order to be parallel in structure—that's the conventional pattern. Readers expect to see that pattern.

Non-parallel List	Parallel List (Preferred)
<i>Office Assistant, ABC, Inc. Manhattan, KS</i> <ul style="list-style-type: none">• <u>Edit and design</u> the bi-monthly newsletter distributed to shareholders• Responsible for <u>assuring</u> employees input time sheets on time	<i>Office Assistant, ABC, Inc. Manhattan, KS</i> <ul style="list-style-type: none">• <u>Edit and design</u> the bi-monthly newsletter distributed to shareholders• <u>Assured</u> employees input time sheets on time

<ul style="list-style-type: none"> • One year experience <u>managing</u> web updates 	<ul style="list-style-type: none"> • <u>Managed</u> web updates since January 2015
---	---

Figure 11 In a parallel list you would repeat phrase structures so that readers can anticipate the structure and read more efficiently.

While readers can likely still understand the information provided in the non-parallel list, they may find skimming this list more difficult than it needs to be. Readers could skim more quickly if the pattern of phrasing were consistent. Readers often recognize patterns in writing and use those patterns to anticipate what’s coming up next and read more quickly. Because the pattern of phrasing in the example is inconsistent, readers will struggle to skim as effectively.

Consistency

Consistency is about sticking with a design element once you start using it. For example, if you indent your first paragraph, readers will expect all of the other paragraphs to be indented too. If you use a particular style for your headings, readers will expect that style to continue throughout the document.

While it’s not a comprehensive list, here are some things to check for consistency when you’re revising a document:

- Font choice
- Paragraph style
- Use of white space
- Use of color or images
- Bullets used in a list

Keeping features consistent within a document takes time and care, so having a document with consistent design is an indicator of professional work. Having consistent and effective design will often increase your credibility with readers.

Consistency in design also helps readers navigate your document. With consistent design, once readers have identified some features, like what a heading and sub-heading look like, then they can quickly locate other headings and sub-headings in the document.

Style Sheets

When working on larger documents or when working with multiple authors, creating a style sheet can help maintain consistency in a document. A style sheet is a separate document that a writer (or editor) creates to detail what design features are used in a document.

Basically, they detail what aspects of contrast, proximity, and alignment will be used and how they will appear in a document. A style sheet might list how far lists and bullet points are indented or if a particular default style in a word processor is used. They may also detail what citation style or style manual will be used as a reference for things not covered on the style sheet (APA, Chicago, etc).

Style sheets are also used to maintain consistency in spelling on words and terms that may have more than one form. This is often in a section called “terms” and presented alphabetically. For example, will you use the term “part time” or hyphenate it to be “part-time”? Both are acceptable, but using both forms might make readers wonder if you are assuming a subtle difference in meaning between the two. Rather than creating the list all at once, you can often update it as you come across terms that have different representations.

Some companies will have style sheets or style guides that all employees are supposed to follow. This is particularly true when writing for external audiences. It wouldn't be unusual for a company style guide to detail different looks for internal vs. external communication.

Incorporating Visuals

Visuals can be important to a document because they can clarify complex information, reinforce important points, and break up a text-heavy page.

Visuals effectively draw and hold readers' attention, so when you decide to integrate a visual, you should make sure the visual contributes meaningful messages that reinforce and emphasize important points in your text. You don't want to drop in a vaguely related visual just to fill space because it may distract your reader if it doesn't support the important messages.

Visuals that you might consider include:

- Graphs (bar, line, pie, etc.)--often useful to show comparisons or trends
- Tables--useful for sharing complex information with minimal repetition
- Flow charts--helpful for clarify processes
- Icons--helpful for drawing attention to important features in a text, like warnings

When you incorporate a visual into the text, you may need to frame your visual into the document:

- Introduce the visual in the text before you show it.
- Share the visual with features that help to clarify its purpose: captions, titles, labels, etc.
- Explain the visual in the text that follows.

Framing a visual into a document in this way assures that the reader knows when to look at the visual and that they know how to interpret the visual.

Activities

1. Pick up a copy of your local school newspaper. What design elements do you see being used consistently throughout?
2. Find a website that you feel has effective design. In groups or as a class discuss what features of the website relate to contrast, proximity, alignment, and consistency. Do you see any room for improvement?
3. Find a brochure or flyer that you feel was poorly designed and bring it to class. What changes would you make to improve the document?
4. As a class discuss what design features you feel would work best in workplace communication. Create a style sheet for the class to follow on the next assignment. Be sure to include what style manual you will use for reference and any deviations from the manual you will make.

5. Below you can see three lists of sample headings, each with a weakness. Revise each list to resolve the problem.

	Descriptive	Parallel	Length
Samsung Infinity GS3 Wireless Speeds and Interface, LG Fomorian ZX2 Product Specifications and Use	√	x	Too Long
Flavor 1, Flavor 2, Flavor 3	x	√	Too Short
Mutual Fund Risks, Benefits of Mutual Funds	√	x	Good

Collaboration

What do you think of when you think of working with a group? What past experiences have you had writing with a team? Were these academic assignments or have you also been a member of a team at work?

The workplace requires collaboration; in fact, employers are putting a great deal of value on the ability to communicate and collaborate. As a result, there is a very good chance that when you enter into your professional fields, you will face tasks and projects that require collaboration. For most of you, collaborative skills will be a regular and significant part of your workplace communication. Thus, the goal of this chapter is to consider the skill of collaborating in the following ways:

- The ways individual personality types as well as learning and working styles impact a group's dynamic and ability to be successful.
- Different ways of planning and structuring your team's approach to a writing project.
- Types of documents central to team projects. These include collaborative charters, project schedules, as well as meeting agendas and minutes.

Analyzing Individual Skills and Group Dynamics

Let's consider a scenario in which you and several colleagues have been assigned a project. Your company is planning on opening a new branch and has asked your team to prepare a site inspection report. You are now a part of a collaborative writing team. Where do you start? Has someone been assigned the lead role? If not, it is a good idea to select a project manager whose primary role is keep the group organized, communicating, and moving towards the completion of the project.

Before you get wrapped up in the details of the actual project, take some time to individually reflect on your strengths and weaknesses and then use your first time meeting as a group to share your individual skills and learn how each of your team members approach writing and group communication

For larger projects, especially, or when working with new people, taking the time to consider each member's particular skill set and communication style allows for a more efficient and successful collaborative experience. It is equally important to first establish ground rules for how the group will work and how the project will be completed. The steps that follow will also reduce frustration, and typically yield a stronger finished product; and in the workplace, this success also translates into time and money saved.

Before your first group meeting, take the time to individually reflect and prepare answers to the following questions:

- What strengths do you bring to the group?
- What kinds of challenges do you see for yourself or the group in this project?
- What kind of communicator are you? Are you more a listener or a talker? Do you tend to seek consensus or do you question assumptions? Are you the type to seek debate or do you avoid confrontational styles of communication?

Then, during your group's first meeting, plan on sharing your individual responses and discussing any possible points of concern that team members have about completing the project. Understanding and considering how each person in the team functions will help the group determine the best methods to use communicating and collaborating. To help you facilitate this conversation, try having someone take notes while going through this quick list of questions with your team:

- Given the communication styles of your teammates, how can you make sure everyone is able to offer their opinions?
- What modes of communication and interaction do you prefer? Which modes are you comfortable with?
- Do you have any personal goals or areas for growth you can see for yourself in working on the project? What are they and how might the team help you with them?
- How much time/effort are you willing or able to contribute to the project? (If there is a significant difference between team members, you should discuss what effects this might have on the individuals, the team, and the project.)

Structuring Collaboration: Three Approaches

This section will introduce three common structures for collaborative writing: face-to-face, skill-based division, and progressive tiered. When thinking about how your group completes a project, keep in mind the fact that there is more than one way to write effectively as a group. In fact, we recommend you try all three of the approaches outlined below throughout a group project keeping in mind the advantages and drawbacks for each. Each approach is best suited for certain aspects of team writing

We also advocate teams begin a project by first electing a project manager whose primary responsibility is to ensure the group is communicating and that the project is completed on time. The most effective project managers tend to be highly organized individuals who are able to keep the team communicated and consumed on completing quality work on time.

Face-to-Face

As the name implies, this approach involves getting together as a group. Your group can and should meet in person (or using available technology like Skype) whenever possible early on in a project and again periodically depending on the size and scope of the project. Face-to-face collaboration is ideal for brainstorming ideas, planning the document's goals, or discussing and addressing problems or concerns related to the project.

However, think about three people sitting at the computer trying to draft a document. One person is typing, perhaps another person is dictating his or her point to the typist, and the third individual is following along, making comments and suggestions as the draft unfolds. There is also a decent chance the person who is neither typing nor dictating becomes disengaged from the project when he is unable to see the screen or have his ideas also dictated into the draft.

As this example illustrates, it can certainly be harder to try and write a draft during a face-to face meeting. However, in projects that have a quick turnaround or on which team members have limited availability, this may prove your best option.

Skill-Based Division

It is not always necessary or productive to meet face-to-face at every stage of the writing project; there are times during a writing project when dividing and conquering the work based on team members' individual strengths, skills, and availability makes more sense. In order for this approach to be effective, team members must be self-aware and disciplined, and the group must trust each other every step of the way.

Progressive Tiered

Lastly, think about the advantages of having one team member (perhaps someone who feels less confident in her skills as a writer) create the initial draft of a document and then forwarding it on to the next team member to add, delete, and ask questions. Depending on the number in your group, you may pass the draft to a second and third reader, each one adding to/taking away from the original draft. [Note: you should always keep a copy of each draft so that content is never lost for good.] Finally, perhaps one person, designated as the general editor, will act as a final reader.

Can you see how having a series of different writers revising and strengthening a draft can result in a much stronger document?

Common Collaborative Planning Documents

When given a collaborative project, it's tempting to quickly divide the work into individual tasks and then just get the work done. This strategy might be successful in smaller projects, or with a group that has already developed a process for working with each other. For larger projects, or when working with new people, taking the time to establish ground rules for how the group will work and how the project will be completed will save time, reduce frustration, and typically yield a stronger finished product.

Team Charter

You likely will want to meet face-to-face to create a team charter; this document acts as an official record that group members have agreed upon.

A charter often consists of group as well as individual goals and objectives. More importantly, it will detail how the group will handle stressful situations.

What will you do if someone misses or cannot make a deadline? How will your group handle work that is subpar your agreed upon standards? How will the group measure success? What will the group do when there is a disagreement? These are the sorts of situations groups in the real world are likely to encounter at times, so having a plan in place that all team members agree on for these issues is essential.

Creating a team charter basically involves developing [policies and procedures](#) for how the group will work together. The self-reflection questions you and your group members answer at the beginning of your work together will help you with developing these policies. Creating a policy document does a lot of things for you and your group. It helps you all develop a clear idea of how the group has agreed to function. A good policy document will also have established policies on anticipated problems that group members can reference later on. Some things team charters typically cover include:

- Team and individual member goals
- Commitment of each team member
- Methods for communicating including meetings and other modes of discussion

- Conflict resolution
- How to handle missed deadlines and unacceptable work

Below is a sample team charter for a collaborative project in designing a brochure and writing an accompanying analysis of the group's design. This example includes what we feel are important questions to address as a group.

Team Charter

Broad Team Goals:

- Design a brochure that attracts and satisfies the audience
- Have an organized and developed memo analyzing key design features of our brochure.

Measurable Team Goals:

- Meet all of the group task schedule and in class deadlines.
- Fulfill the requirements outlined in the rubric.

Personal Goals:

- Joan - improve editing and computer skills
- Skylar - improve media and design skills
- Jerry - improve writing speed and management skills
- All - Time management and equal distribution of workload

Individual Commitment:

- All members are will to put in maximal available effort and time to achieve the best brochure and memo possible.
- Project Manager: Jerry Smith

Methods for Communicating:

- Will use email for distributing task schedule, agenda and meeting minutes.
- Shorter communications will be over text message
- Project documents will be drafted and revised using Google Docs.

Concerns:

- Commitments outside of this project: class, work, and involvement in organizations
- Unexpected assignments in other courses and/or work schedule conflicts

Conflict Resolution:

- First, attempt to meet and discuss the conflict. Attempt to reach a compromise.
- Contact and meet with the instructor

Missed Deadlines:

- The member who missed the deadline will be contacted and will have twenty-four hours to submit an acceptable and completed assignment to the group.
- If they fail to do this they will be contacted again, the instructor will be informed,

Task Schedule

and their grade dropped 5 points.

Unacceptable Work:

- The member who missed the deadline will be contacted and will have twenty-four hours to submit the fixed assignment. Upon resubmission the group members will have a twenty-four hour review period to add any edits.
- If the work is still unacceptable or if they fail to correct their work on time they will be contacted, the instructor will be informed, and their grade dropped 5 points.

Figure 12: Sample Team Charter

Once you have written your group's charter it is much easier to be accountable to one another. Such accountability often goes up the ladder in the workplace, as well, as the document gets shared with supervisors and other members of higher management. For these reasons it is critically important that everyone agrees to the charter's content. For your own protection (and mental health), don't be afraid to speak up if you have questions and don't sign anything until you are absolutely clear about the expectations.

Next, turn your attention back to the actual project. This means designing a document that breaks down the larger end product into the series of tasks required to successfully complete the work. This is where a project schedule comes into play. Here, the goal is twofold:

- Breakdown the complex project into a series of more manageable tasks that take into account what you are learning about the writing process, planning, design, writing, and editing, for example. You want to include group due dates that allow plenty of time for revision before the final product is due.
- Delegate these specific tasks among the members of your team in a way that is fair and that maximizes each individual's unique strengths as much as possible

Sample Task Schedule

The sample task schedule below is incomplete: The team is still working on the project and not all tasks from start to finish are entered.

Date Due	Task	Assigned to	Contribution Value	Status
3/3/2014	Team Charter	Jerry	1	Completed
3/3/2014	Task schedule	Jerry	1	Completed
3/5/2014	Brochure basic design draft	Jerry	2	In progress
3/3/2014	MS Research	Joan	2	In progress
3/3/2014	MS Walk research	Skylar	2	In progress
3/3/2014	Contact Cassi D. for more information	Jerry	1	Completed
3/5/2014	Draft of memo	Everyone at 3/5 meeting	3	
3/10/2014	Meeting Agenda	Jerry	1	
3/10/2014	Meeting minutes	Jerry	1	
Total contribution				
	Jerry Smith - Project Manager	7		
	Joan Garcia	2		
	Skylar Martin	5		

Figure 13: Sample Task Schedule

Notice how the sample task schedule keeps track of each team member's contribution total in addition to listing tasks and deadlines for each team member. This helps the team keep track of the workload and make sure work is evenly divided. Right now it looks like Joan is contributing a little less than the other two team members, but she will likely be assigned more work later in the project to balance things out.

Communication and Documentation

You should get in the habit of documenting all group communication. Doing so greatly improves a group's ability to work efficiently and lessens the chance of breakdowns in communication. Consider how much time is saved when a project manager creates and distributes an agenda to the group before a face-to-face meeting - team members then know exactly what to expect and how to prepare for the meeting. And, as we have been learning, clear expectations leads to more efficient and effective communication which leads to an overall productive (and pleasant) workplace. Traditional forms of

documentation include memos and emails, but there are other available means of communicating that we'd like to look at now.

Agendas and Meeting Minutes

Writing and using agendas and meeting minutes are standard practice for groups, committees, and all types of collaborative work scenarios in the workplace. It is super important to remember that these tools only work if everyone in the group has access to them in a timely manner. Agendas are basically a list of announcements that need to be made, topics to discuss, and a plan for upcoming work and meetings. Busy schedules demand that groups are organized. One of the biggest complaints of students about working in groups is the lack of time and wasted time in unproductive meetings; a well written agenda can solve this problem.

Also, remember that everyone needs to have a copy of the agenda before the actual meeting. The agenda allows for an organized and productive use of time. Too often student groups simply decide on a location and time for their meeting, but "wing it" when it comes to the actual goals and objectives for these meetings. As a result, different students bring different concerns and expectations to the meeting and more often than not, time is wasted as groups try and figure out what they need to discuss and address.

Sample Agenda
<p>Hey Skylar and Joan! Below is the agenda for our meeting tomorrow. Skylar - I have received your information and put it in the brochure. Joan- I still need your information by the meeting tomorrow so I can edit it in to the brochure.</p> <p>The current draft of the brochure is posted on the google doc (link below) https://drive.google.com/?hf845y43yfiahfkjasdkywiehfkbg//</p> <p>Agenda for March 5th, 2013 Meeting We will be meeting on First Floor of Hale Library at 11:30am</p> <ol style="list-style-type: none">1. Review the Current Brochure Draft by Checking for Edits/spelling/grammar/visual distraction2. Create Template and draft the Memo3. Assign printers for the Peer Review Day4. Assign who will print the Final Drafts <p>Have a Great Day and See you tomorrow! From, Jerry Smith Project Manager</p>

Figure 14: Sample Agenda

You may not be as familiar with the idea of keeping meeting minutes within team projects at work as you are with them in an organization you may be involved with, such as those of an honor or professional society, but the same fundamental purpose is served: a record of what was discussed and decided at every step of the project. These records can be invaluable if a team member becomes ill or

gets unexpectedly replaced, or if the boss requests an update, as they provide concrete information and proof of progress.

Meeting Minutes
March 5th, 2013 Hale Library - 11:10am - 1pm

Attendance: All Group Members—Jerry, Joan, and Skylar

Brochure:
Edited and adjusted wording of each panel.
Brightened the color and rearranged the Logo.
Read the MS Chapters comments and made appropriate changes.

Memo:
Wrote the rough draft together
Highlighted trouble lines for peer editors to focus on.

Additional Actions/Decisions:
Resent the new draft of the brochure to the MS Chapter for review.
Members will print their own copies for peer review day.

For Friday:
Individually, read both rough drafts and choose 1 or more focal points for the peer edit on Friday.
Each member brings a print copy of memo and brochure.
Jerry - Bring MS societies response to new draft to class.

Figure 15: Sample Meeting Minutes

Collaborating is a highly valued skill; employers want professionals who know how to work with others in order to complete workplace projects. Taking the time to know your strengths and weakness as well as those of your teammates is an important first step. From there, it is important to utilize a variety of approaches to collaborating. And, lastly, a group’s ability to work together efficiently and to address problems is greatly improved by employing the team documents discussed in this chapter.

Activities

1. In preparation for your work in a collaborative writing team, record your answers to the individual questions listed in the [Analyzing Individual Skills and Group Dynamics](#) section at the beginning of this chapter. Then, be ready to share your responses with your new group members as you.
2. Your group has been assigned a large project that requires you to create a short survey and distribute it to a company’s 545 employees, write-up the results of your survey findings in a memo to your boss, and present these findings in a short presentation to your department a month from now. Create a project schedule outlining the breakdown of tasks, assigning specific components to individuals. Be sure to also include due dates for these tasks. Assume you have 8 weeks starting today for your timeline.

3. Jayne, Inara, and Malcom are working together on a research project and all seem to be doing well with getting information. The day before team members are supposed to have their drafts complete for team review, Jayne sends an email to the rest of the team saying that he has been down with the flu and hasn't been able to work on his draft for the past week. He attached an outline for his draft with a few notes on what sources he is using. How should the team handle the situation?

Presentation

In the workplace, many writing projects are partnered with presentations, which translate documents into easily accessible information for a live audience.

Some common scenarios for workplace presentations can include:

- Training workshops for employees at your company.
- Presenting research findings to a group of senior managers.
- Sharing your company's services with the goal of getting new sales leads.

In the workplace, you may often have to adapt information into an effective presentation to share with others in situations like these and more.

Analyzing Audience and Constraints

Each presentation situation is unique. Start by utilizing the same strategies for analyzing and planning for writing mentioned in [introduction](#). Then, before you begin outlining your presentation's structure and content, consider the following constraints specific to presentations:

- What do you know about your audience members? What unites them as a group?
- What do you want your audience to do after hearing the information in your presentation?
- What questions are they likely to raise?

Once you have considered the presentation's audience, you can begin planning your presentation by answering the following questions:

- Will you be presenting alone or with a group?
- How much time do you have?
- What kinds of visual aids and technology will you be able to use?
- How far away will the most distant audience members be seated or standing?
- What are the expectations in terms of the level of formality for your presentation?

Types of Presentations

Once you've identified your purpose and defined your audiences, you can identify the type of presentation you need to give and what strategies to employ. Typically, a presentation will employ elements of more than one of the types listed below.

Informative

Informative presentations might involve simply reporting information or explaining concepts, applications, or methods to your audience. A presentation on annual sales numbers and scenarios 1 and 3 listed above both fall into this category.

Persuasive

This type of presentation could be meant to influence the audience's point of view or convince the audience to follow a particular course of action. Typically, this will involve presenting evidence and

logical arguments in addition to engaging your audience. A proposal could be a type of persuasive presentation as could any sales related presentation like scenario 4 listed above.

Goodwill/Ceremonial

These types of presentations frequently show up at special events like weddings, award ceremonies, and even funerals, and are generally performed as a speech with little to no visual aid. The purpose is to generate goodwill and basically have a positive impact on the audience's emotional state. In a professional setting, you may have to give a talk at a special event like an employee of the year celebration or celebrations of special events related to your company or the company's location. Something like scenario 2 could be likely if your company invests in community relations. They differ from other presentations that they frequently serve a ceremonial or even ritual-like role in their setting.

Presentation Formats

It could be argued that there are as many formats for presentations as there are presentations, but we will look at a few general formats to get some ideas on how you might form your presentation.

Monologue

This format is probably what you envision when you think of a formal presentation or speech—the presenter talks while the audience is silent. There typically isn't dialog between the speaker and audience. The only communication between them may be non-verbal. An advantage of this style is that it is easy to execute once you've prepared for it. A disadvantage is that it may leave an audience with unanswered questions.

Q&A

This approach is often, but not always, less formal and allows for greater interaction with the audience. While the presenter may spend some time presenting information or an argument, much of the time is focused on responding to questions from the audience. A town-hall-style talk or a sales meeting with a small group of clients might take this form. This format can create a strong sense of engagement with the audience, but preparing for it is more challenging as the presenter needs to be able to adapt to questions, but also keep the presentation on topic.

Group Presentation Formats

Group presentations will typically use features of the formats listed above, but may differ in how the group members relate to each other.

Group Integrated

Group members give parts of one integrated presentation. Members may take turns speaking or split topics of the presentation between them. They may act out scenarios together at points if that is the most effective means of communicating their concept. The key here is that despite having several presenters, there is a clear sense that it is all *one* presentation. This type of presentation takes a lot of coordination and practice between group members to be effective.

Group Divided

You may see something like this as a panel talk at a professional or academic conference. Each group member gives an individual presentation, but each presentation relates to the others.

Structuring a Workplace Presentation

An effective presentation will be easy to absorb and remember. When reading, a person can stop, pause, and reread if they didn't catch a point the first time. Unfortunately, unless a presentation is being recorded and made accessible online, if the listener misses something, there's no way to go back and catch it again. As a result, adapting your writing into a memorable presentation requires distilling your content into a more focused verbal presentation. From there, the keys to helping your audience remember your most important points are repetition and emphasis.

As in writing, you want to include transitions to guide your audience in following your structure. Transitions will not only guide your audience, but are an example of using repetition and emphasis to help your audience retain the key points of your presentation. Plan on including one or two sentences much like you do in writing to transition between the opening, body, major points within the body, and your presentation's close. For example, in a presentation discussing ways to retain employees within your company you could include a transition between your first and second main points. In this example, a transition could be something like, "Before we look at several key strategies for retaining employees, let's take a moment to review the major causes of employee separation from our company."

Now, let's look at strategies for structuring and organizing the opening, body, and close of your presentation.

Opening a Presentation

One of the best ways to assure your audience members take note of what's important in your presentation is to catch their attention quickly and set up clear expectations for what they can expect to learn. Consider choosing from some of the following strategies:

- 1. Create a hook to catch the audience's interest.**

You don't want to include an arbitrary gimmick, but you can engage the audience by telling a connected joke, asking an engaging, thought-provoking question, sharing an interesting and relevant anecdote, or perhaps a memorable quote. When considering a hook, just be sure to retain the appropriate level of professional formality.

Establish your credibility.

Introduce yourself/group members and share your credentials. Tell the audience what qualifies you to speak on the topic.

Define a purpose or objective.

If the purpose of a presentation is very clearly defined in goal form, listeners are much more prepared to think about your presentation and to recognize what's important.

Provide an agenda or overview.

An agenda maps out the structure of the presentation and helps the audience to prepare for the significant sections. By sharing the major talking points, the audience will be ready to listen and absorb when you get to items of importance. Doing so also allows your audience to anticipate what's upcoming and establishes a clear outline to organize your presentation.

Offer background information on your subject.

If necessary for your audience and before transitioning into your presentation's main points, provide the pertinent background information.

Organizing Body of a Presentation

This section is where you will address and develop the main points of your topic. As a result, this section will take up most of the time allotted for your presentation.

1. Establish an organizational pattern that suits your purpose.

You can choose from other organizational patterns used in writing such as chronological, problem-solution, spatial, or any other logical structure your audience will be able to easily follow. For example, an informative talk could be organized to cover points moving from the general to more specific.

2. Clearly state and develop your main points.

Be up front about your point and offer supporting evidence and examples. Some ways to develop your content are by referencing case studies, telling relevant stories, providing concrete examples, and showing data and results. Additionally, you can help your audience to recognize main points by repeating them in your visuals and using verbal cues that acknowledge their importance.

Closing a Presentation

It is important to end a presentation as strongly as you began. Audiences tend to remember the opening and closing of a presentation, so avoid rushing through this section; ultimately, your ending provides an opportunity to once again emphasize and repeat your key points.

1. Bring the presentation back to the agenda.

Signal the end of your presentation by restating your main points just like you do in your writing.

Offer any recommendations.

These recommendations should be based on the information and evidence provided in the body of your presentation.

Give your audience something to do with the information you shared:

Make a call to action or give them a question to reflect on, etc.

Solicit questions.

You may want to transition into a Q & A at the end of your talk.

Thank your audience.

Visual Tools to Support Your Talk

Visuals are a great way to support your verbal points in a presentation. So what makes an effective presentation visual?

- **Be consistent.** When designing your visual aids, repeat patterns, font selection and size, and limit the complexity of slides helps readers to recognize important information and to process information more efficiently.
- **Keep text simple and minimal.** Think of text in visuals as an emphasis tool. Too much text can draw attention away from your message. Images should be used to add depth to verbal content. For example, limit the number of bullet points on a slide to 4-6.
- **Use accessible design.** As with document design, be mindful of the readability of your visual. Also, think about what the type you choose conveys to your audience.
- **Integrate visuals.** Don't just show them; talk about them, and gesture to them.
- **Consider culture.** If your audience includes individuals from a culture different than your own, be mindful of avoiding jargon, cliché, and slang. In general, it's good practice to select visuals that are culturally inclusive.

When creating slides or other visual tools, plan to spend about approximately 1-2 minutes on each visual or slide. Lastly, you may want to review and adapt the [principles of effective design](#).

Delivery Techniques

Our best advice for successfully delivering presentations is to practice using any technology you intend to use in your talk.

- Speak clearly, maintain a pace your audience can follow, use an appropriate volume to ensure your audience can hear you, and avoid speaking in monotone by adjusting your pitch.
- Remember to clearly introduce each point and connect it to the needs of the audience (i.e. "Here's why this matters to you"). You should plan clear verbal transitions between points to help audience members' transition from one point to the next.
- Make eye contact with your audience. You want to avoid reading from notes and not engaging your audience through eye contact. Notecards and slides are meant to guide your talk, not to act as a script.
- Engage the audience through movement and gestures that draw audience attention to supporting visuals and to you as needed by the content.
- Maintain professionalism. Establish and maintain your credibility by dressing professionally, adhering to the timeline, and referencing your source materials.
- Be aware of time. You may have someone helping you keep track of time, but without practice you will still find yourself either rushing towards the end or finishing earlier than expected.
- Respond to audience feedback. If a Q& A follows your presentation, be prepared to answer questions.

Activities

1. As a student, you see lots of presentations every week. In small groups, discuss some of your classes. What presentation formats do your professors use? How do they use verbal and visual strategies to emphasize information?
2. Watch [“The Impotence of Proofreading” by poet Taylor Mali](#). Pay attention to how he uses body language, eye contact, tone, and pauses to create emphasis and engage his audience.
3. Look at several PowerPoint presentations online. Which ones were the best and why? What could be done to improve the least effective presentation slides?

Sample Assignments

The following pages provide sample assignment options for instructors to use in their classes. These assignments are open to revision by any instructors.

Skills: Research, Summary Writing

Genre: Memo

ENGL 417 Trade Journal Response Memo

[Assignment courtesy of Danielle Turner]

There is a very good chance you will continue to use the skill of summarizing when writing at work. Formal proposals and reports, for example, contain abstracts summarizing the documents. This assignment will provide you with further experience in writing summaries while also giving you the chance to learn more about and respond to a current issue in your field.

For this assignment, you will identify a feature article from a reliable trade publication in your field. Ideally, this article will also relate to communicating in the workplace. Make sure the article you chose is current, credible, and well developed. Read the article carefully, print a copy, and take notes (these notes may be collected, so be sure to save them). You will then write a brief summary and response to the article. When planning and crafting your memo, keep the following in mind:

- Provide the article's author, title, and brief background information regarding the magazine/journal in which it appeared.
- Include a brief summary of the article's focus (approx. 250 words), as well as its target audience.
- Include at least one idea you found especially interesting or useful (ideally, to communicating in the workplace).
- Include a brief summary of how others in your field might find the article useful. You might also want to photocopy a few pages for classmates in your field.

Additional notes:

- Use the memo format to complete this assignment.
- Use complete sentences and paragraphs, rather than bulleted texts, to address all the requirements.
- If you include any quotes or paraphrase any of the author's ideas, include proper in-text citations
- At the end of the memo, skip a line, switch to italicized text, and write a complete citation for the article using MLA.

Skills: Reflection, Critical Thinking

Genre: Memo

ENGL 417: Performance Review Assignment

[Assignment courtesy of Danielle Turner]

One common genre of argumentation you will use in the future is personal self-reflection and evaluation. Most likely, you will use this type of argument during workplace performance reviews, when you ask for a raise or a benefit, or any time your employer or others need to have written evidence of accountability for your progress.

As a way to practice this type of workplace writing, your last assignment of the semester will be to review your performance in terms of the course objectives. In order to write a successful Performance Review, you will need to use the following strategies:

- Review the objectives of the course.
 - *What do you feel you have achieved?*
 - *Can you find concrete evidence of this through your work? Looking back at both your self-evaluations, as well as the responses your group composed for the two collaborative projects, may prove helpful.*
 - *Demonstrate how your efforts this semester have been aligned with the course objectives*
- Review the stages you went through to create documents for the course.
 - *Compare older drafts to newer drafts. What did you learn from peer review comments? What did you learn from the revision process? Feel free to quote or paraphrase examples from your work.*
 - *Was your time used wisely? How might you improve for future workplace writing projects?*
- A performance review should remain upbeat. However, overly positive reviews show a lack of reflection and potential delusion on the part of the writer.
 - *What did you struggle with in learning to write for the workplace?*
 - *How have you overcome these difficulties? What evidence of overcoming these difficulties can you show from your work?*
 - *What areas of writing or collaboration do you still need to work on? Evidence?*
- Keep audience-based reasoning in mind.
 - *What does your teacher or “supervisor” value and care about?*
 - *What arguments should you stay away from because they are not audience-based?*

You should format your performance review as a memo addressed to your instructor.

Organization for a Performance Review should be logical and consistent. You may choose either topical or chronological organization.

Length depends on how introspective you become and what topics you choose. A single-spaced, TNR, 1-inch margins, 1-2 page memo is usually sufficient room to develop 2-3 main ideas.

Skills: Collaborative Writing, Research, Critical Thinking and Analysis, Summary Writing

Genres: Proposal, Brief or Routine Report, Memo

Collaborative Project

[Assignment courtesy of Anna Goins, adapted from Cheryl Rauh]

To continue strengthening our critical thinking and writing skills, and to develop the types of collaborative writing strategies that most industries require, you will complete the following project in teams of four or five.

What will you do?

As a team, choose one of the following options:

- A. Identify an area of communication in the professional workplace that is a part of a significant conversation about contemporary business practices, learn more about it and how it could relate to you as young professionals, and present your findings in a brief comparison report that looks at two different types of workplaces (i.e. an accounting firm and a chain hotel). Two is the minimum for comparison and you're encouraged to do more.

Perhaps you'd like to know more about multicultural awareness, or are interested in the ongoing discussions around gendered communication styles, for example, or are interested in learning more about the effects social media on small businesses. As long as the topic is related to communication in the workplace, and is one that your team agrees to pursue, the choices are wide open!

- B. Identify a problem common to the industries you're in, i.e. high employee turnover in the customer service industry, conduct research as to the potential causes and their impacts, and write a brief feasibility report (if your team finds a potential solution the problem), or a cause report that seeks to clarify the situation and prepare for leadership's decision.

For either option, you'll want to narrow your topic to one that's manageable for a brief report.

Step One: The Project Proposal

Once your team reaches a decision about Option A or B, it will write and submit a 2-page project proposal to me in order that I may approve your choice. This proposal will be in single-spaced memo format and should be sent as an attachment via email no later than 11:59 p.m. on Tuesday, Feb. 16. Your purpose for writing is to convince me that your group has a solid plan for a well-formed, relevant topic as well as to provide you with experience in writing proposals. This assignment will also help your group understand what you need to do in order to write your research findings report on time and with quality. Be sure to organize your proposal according to the guidelines established in our class handbook and discussions.

Additionally, it can be very useful to include a section where you make explicit your research questions and goals, and discuss your research methods/process. Well-developed projects will likely include both

primary and secondary research, and at least 5 sources that are cited both in-text and in a standard Works Cited or References page (not included in the final page count).

Step Two: Research Findings Report

Once your topic is approved, follow the research where it takes you and write a brief, 4-6 page, single-spaced report in memo format that both summarizes your findings and offers analysis and justification of them. I am the primary reader for the report – imagine me as the supervisor who could take your findings to the next level. The exact nature of the report will vary according to your option and the research results, but should continue to follow the guidelines established in our class handbook and discussions. This report is due to KSOL by 11:59 p.m. on Friday, Feb. 26.

Skills: Collaborative Writing, Research, Critical Thinking and Analysis, Document Design with Visuals, Writing for a Public Audience

Genre: Brochure

Collaborative Assignment

[Assignment courtesy of Dan Von Holten]

Relevant Course Objectives: 1, 2, 5, 7 (see additional below)

You and your team will research an unpopular food source or product (e.g. guinea pig) and create a tri-fold brochure promoting that food source or product to local grocery stores and their customers. You will need to find a reason beyond flavor to sell the product on. You could take an angle that the food is a healthy alternative to another food or perhaps it is more sustainable. Whatever the argument, you will need to do some research to back it up.

In determining if a product or food source is popular consider that if it is popular enough to be at the local grocery stores in Manhattan, it is probably popular enough that it isn't an eligible topic.

Learning Objectives

Completing this project will help you hone your skills in working with a group on a creative project. You will also develop your abilities to integrate visuals, text, and document design using collaborative design tools. As brochures have limited space, you will also continue to practice concise writing.

Relevant Course Objectives

In addition to course objectives 1, 2, 5, and 7, this assignment will have the following objective:

- Actively participate in the planning, maintenance, and execution of a collaborative project.

Product

You and your team will create a color tri-fold brochure that uses a combination of design elements to promote an unpopular or underutilized food source or product to US consumers. *You will create the brochure using Lucidpress and save the final document as a PDF file.*

Process

While the assignment of creating a brochure is rather straightforward, you are also working on this as a team. *You will need to document your work and progress.* The steps below should give you an idea on how to go about documenting and completing your project.

Step 1: Discuss team function and divide responsibilities (Choose a project manager or split the duties.)

Step 2: Schedule meeting times (take meeting minutes)

Step 3: Choose your topic

Step 4: Research

Step 5: Determine the purpose and audience for your brochure

Step 6: Create the brochure using Lucid Press

Step 7: Individually write a self-evaluation (reflection) on the project

Task Schedule

Refer to the Wolfe readings and page 3 of this assignment for details on creating the Task Schedule.

Keep in mind that the Task Schedule will need to be updated regularly. **Store the Task Schedule on a cloud service that allows all team members access to the document.** This way, you can make modifications from any computer during meetings.

Choosing a Topic and Doing Research

After developing a team charter, you may want to discuss possible products or foods. You may want to start with discussing popular foods from your home region compared to here in Manhattan. Ideas on foods can vary even over short geographical distances. (e.g. Rocky Mountain Oysters). The food can be plant or animal based. There are some grains, like Amaranth, not typically available in the US. Your research may include typical internet searches, but you may also want to try the library databases. If possible, consider taking a few minutes to contact or talk to someone in biology or ecology for ideas.

Once you have a topic, you need to determine the purpose of your brochure. Are you promoting a source of food or a product that uses that food source? (For example barley or barley tea.) Once you know your product, you need to determine its selling points.

You will need to have something more than the flavor of the product to sell it on. For example, a food may be a sustainable alternative to another common product or it may have a more robust nutritional profile. Once you know more about the product, you can develop the message for your brochure. Give some thought to the needs or concerns of the consumers and decide if you want to focus on a particular group such as health conscious, thrill-seeking, or vegan.

You will probably need to do a little research to determine the needs and concerns of your audience. You may want to create a brief summary of your audience for future reference. Then, you can move on to actually creating the brochure.

Creating the Brochure

You will create your brochure using a cloud service called Lucid Press. You can use the basic features of the software for free, but you will need to create an account. Go to <https://www.lucidpress.com/> to see a brief tutorial video and to create your account. The service has several built-in collaborative tools and allows several people to work on the same document simultaneously.

The service has several templates for tri-fold brochures. You will likely need to remove or change elements from the templates if you don't start from a blank page.

Additional Assignment Components

As this is an exercise in working together as a group as well as learning design elements, your group will turn in the following documents in addition to the completed brochure:

Component	Value	Group or Individual	Due
Documentation Portfolio	30 pts	Group	
Brochure	30 pts	Group	

Self-Evaluation	40 pts	Individual	
Total	100 pts		

Team Formation And Task Schedule

Before anything else, meet with your teammates and discuss how you will function as a team. You will be given an agenda for your first meeting that will take you through topics similar to what appears in a team charter from your readings. As a result, your first set of meeting minutes should outline how your group will work together, individual goals for each team member. It will also explain what the team will do when an individual is unable or unwilling to complete his or her share of the work.

You may want to refer to Wolfe Excerpt 2 (sample on pg 38) for an example of how another team approached these issues. *Your first set of meeting minutes should also include a tentative task schedule* dividing work between team members. Model your tentative task schedule after the one found in Wolfe Excerpt 3 (sample on pg 46). Make sure you *include contribution values* and totals for each team member.

The schedule should outline specific tasks necessary to complete the project. It should also list which team member(s) are responsible for each task and give a deadline for those tasks. Keep in mind that administrative tasks like creating or updating the task schedule, taking meeting minutes, or sending reminders would all be tasks that could be included on the schedule.

As a team, assign each task a value from 1-5 to represent the amount of work involved with each task. Your goal is to distribute the work as evenly as you can.

Treat the task schedule as a working or “living” document. Expect to update and modify it regularly. At the end of the project, you will submit a completed task schedule. Gross differences in levels of contribution (20% or more) will result in an adjustment to an individual’s score on the brochure.

SET YOUR DEADLINES A LITTLE EARLIER THAN ABSOLUTELY NECESSARY IN CASE PROBLEMS COME UP.

Documentation Portfolio

Part of collaboration in the workplace is documenting your work. Meeting minutes are a very common form of documentation, but any correspondence to your teammates on a project is also documentation of your work and contributions.

At the end of the project, your team will put together an electronic documentation portfolio. It should include (in order)

- Completed Task Schedule – It should give the full name and contribution total for each member.
- All Meeting Minutes/Agendas—In chronological order.
- All Correspondence—This can include emails, text messages, or scribbled notes passed between team members.

You are encouraged to have meetings (virtually or physically) outside of class. We will dedicate Wednesdays to group work and your teams can count on those dates as a time to meet. You will need to take meeting notes at your meetings. *Bring your laptop to class on those days.* I will check in on your group on Wednesdays and ask to see some of your documentation and give you feedback on it.

The person responsible for taking the minutes needs to distribute the minutes to the team within 24 hours of the meeting. This should be easy enough to see in the documentation part of the portfolio. Make sure your subject lines are clear. You can find an example of meeting minutes in Wolfe excerpt 1 on page 18 of the text.

The meeting minutes should include the following information:

- Date and location
- Action Items (things individuals will have complete before the next meeting)
- Important Decisions/Topics of Discussion
- Next Steps (questions or actions for the next meeting)

Self-Evaluation—Reflection

While the other components are considered group documents, each team member will write his or her own reflection on the project in the form of a self-evaluation. It may come as a surprise to some that reflective writing plays a role in the workplace. Many workplaces will ask employees to write a self-evaluation as part of an annual review process.

Frequently a portion of that evaluation will require the employee to reflect on his or her achievements, challenges, and sometimes shortcomings. In other cases, a self-evaluation might be part of your argument for a change in your responsibilities at work or in making a case for a raise. In any of those cases, solid reflective writing will show that you are able to learn from past experiences and apply those lessons to the future.

The self-evaluation should be 400-600 words long. It can take the form of a letter or memo addressed to the instructor. You will be given a prompt to direct your reflection when the assignment is available for submission.

Skills: Research, Critical Thinking and Analysis, Collaborative Writing

Genres: Proposal, Brief or Routine Report, Oral Presentation

Collaborative Presentation Project

[Assignment courtesy of Cheryl Rauh]

The goal of this 3-part assignment is simple: I would like your group to propose, research, and present to the class on a topic related to written communications for the workplace. What follows is a description of the collaborative project's 3 major components and how these documents will be evaluated.

The Project Proposal

This assignment is the first in a series of sequenced assignments for the collaborative presentation project. For this assignment, your group is being asked to write a 2-3 page,(excluding the bibliography) single spaced memo outlining your group's research interest. I will be the audience for this proposal. Your purpose for writing is to convince me that your group has a solid plan for a well-formed, relevant topic as well as to provide you with experience in writing proposals. This assignment will also help your group understand what you need to do in order to write your research findings report on time and with quality. Be sure to include the following boldfaced headings to organize the sections of your proposal:

Introduction: What is the purpose of this memo? Introduce the proposal itself, identify your group's purpose, and give a brief overview of the content of the proposal.

Project Description: What topic is your group proposing to research and present to our class? Provide an overview of what your group will cover with in your project; be specific. Justify why this topic is relevant and important for your group to research and present to your peers. This should be the longest section and needs to include your preliminary research on the topic (and properly cite both in-text and in the bibliography) and discuss how this initial research fits into our course's focus on writing in the workplace. Be persuasive in demonstrating the relevance of your topic to our course objectives.

Important note: when choosing your topic, avoid general or broad topics such as "technology in the workplace." Instead, narrow your focus to a more specific aspect of technology related directly to written communications; for example, "Writing for Web: Rhetorical Principles for a Diverse Medium."

Proposed Research Questions: Here you get more specific in terms of what questions your group's findings memo intends to investigate (and ultimately answer) and what your group's presentation will deliver. Here, you will list the 4-6 research questions your project plans to answer—with each question, be sure to also include a justification explaining why each question is important to your presentation's audience. Why are they important questions to address? Keep your presentation audience in mind as you consider these answers. What is your purpose?

Methods: Describe what your group needs to do in order to produce a quality findings report and ultimately design and deliver your group presentation. What will your group do first? Search professional writing websites? What will your group do second? Interview people? What will your group do third? Be specific and thorough. I expect to see all your research questions/report contents be accounted for here, i.e., if you stated that your group was going to answer a certain question or include

a certain section in the report, I expect to see relevant research done/planned for regarding that question/section.

Bibliography: List the 3-5 sources your group consulted in your preliminary research, following either the APA or MLA style guide. In this initial stage, it perfectly fine to only consult credible websites.

Research Findings Report

This short report is the second in a series of sequenced assignments for the collaborative presentation project. For this assignment, you are being asked to write a short 5-6 page, single spaced report summarizing your research findings (excluding the bibliography). Your classmates and I will be the audience for this report. Your group's purpose for writing is to inform the audience about what your group learned about your topic as well as to provide you with experience in writing short reports. This assignment will also help your group plan how to organize and create your professional presentation on time and with quality. Your report should include the following sections:

Introduction: What is the purpose of this report? Introduce the research itself, identify your group's purpose, and give a brief overview of the content of the report.

Research Findings: (You group should create specific headings for the body of the report to reflect the content): Here you provide an organized summary of what your group uncovered; be specific. Justify why this research is relevant and important to your peers. Here you provide specific answers to your proposed research questions. Your group's goal in this section is to explain the following:

- What your group hoped to find and what your group learned (i.e. the answers to your research questions). Here you will be demonstrating the ability to effectively write summaries of your sources. (Also, if any of your questions changed over the course of the project, you can discuss that here as well.
- Why your research findings matter to your audience. How does your group's research findings relate to our course's focus and objectives?

Conclusion: Recap the major findings here and how they relate to written communications in the workplace. Indicate the areas for further research on this topic. What are questions would you investigate if this were a larger project?

Bibliography: List the 4-6 sources your group consulted while compiling your findings report, following either the APA or MLA style guide. Be sure your sources are credible, current, and avoid relying on ".com" websites.

Formal Presentation

The semester will close with your group presenting your research findings to the class. Essentially, I would like each group to present the aspect of workplace communications you proposed and discussed in your research findings report. For this 20 minute presentation, your group should plan to use presentation software (usually in the form of a Power Point or Prezi presentation). It might be helpful to begin by presenting background material and indicating your group's research questions and your reasons for examining these questions. Focus on certain key points that demonstrate the value of your topic to your audience. I am happy to review presentation outlines beforehand.

The presentation audience is your fellow classmates, whose majors represent a range of professional areas, and who may already have some knowledge of your topic. You are also encouraged to create and distribute a handout to supplement and enrich your presentation's content. Be sure you include a citations as well as a bibliography slide (APA or MLA style please) indicating where you found your information. It is important that you clearly and fully document all information from other sources. You need to dress formally for the presentation. Please be prepared for questions— a 3-5 minute Q&A session will follow your presentation. If you've researched your topic, you will be able to answer many questions. Still, the most important advice I can give you in this regard is that it is perfectly acceptable to say you do not know the answer to a question.

I will be grading you based on the tips and guidelines discussed in our readings in regard to designing and delivering a presentation (Refer to KSOL readings as well as the Truth about PowerPoint). The PowerPoint and any handouts you intend to distribute in class must be uploaded to the KSOL drop box on the due date. It will help you to practice your presentation a few times. You may use note cards, but avoid relying too heavily on these notes.

As a final note, remember that you will also be receiving an attendance & participation grade for listening attentively to others' presentations and ask thought-provoking questions of the presenters. As a result, your grade will be lowered if you do not attend, arrive late to class, "zone out," or find yourself otherwise engaged with your cell phone during your classmates' presentations.

Skills: Collaborative Writing, Document Design with Visuals, Research, Critical Thinking and Analysis

Genre: Memo

Team Graphic Memo

[Assignment courtesy of Anna Goins]

Collaborative Writing (15%)

Using magazines, journal articles, and other printed sources, gather information about how visuals are used in your and your team members' fields. In a memo to me, show examples of those visuals (you are also encouraged to make/design your own visuals) and explain why you think they are common (that is, why they are useful).

- Opening – identify subject, establish purpose and explain relevancy to the audience
- Body – provide examples and explain how they are useful in each respective field
- Closing – routine statement (no action required from audience)

Be sure to format your memo and document all sources correctly – both in-text and on a Works Cited or Reference page. Refer to the handbook for guidance on collaborative writing strategies, research help, and information on integration of visuals; specifically, review and apply the general principles of business communication generally discussed in other chapters.

Individual Reflection (5%)

In a separate, confidential memo to me, respond to the following questions:

- How can I summarize what I learned about visuals and their use in written documents?
- How will my increased knowledge of visuals benefit me in the workplace?
- What did I learn (specifically and generally) about the collaborative writing process? What went well? What did I, or we, struggle with?

Assessment

Your collaborative document will be evaluated upon its clarity in focus and purpose, development of ideas, logic of organization, integration of visuals, consistency in tone/style/editing/voice, and overall document design and proofreading.

Your individual memo will be evaluated upon its clarity in focus and purpose, development of ideas, logic of organization, consistency in tone/style, and overall document design and proofreading.

Skills: Collaborative Writing, Research, Critical Thinking and Analysis, Writing for Public Audiences, Document Design

Genres: Brief Report, Website, Memo, Video

Group Recommendation Report or Website Design Project

[Assignment courtesy of Seely McCarthy]

Objectives

- Identify the audience or audiences of a writing task and analyze their needs, attitudes, expectations, and the rhetorical purpose of the writing task in order to present information accurately and persuasively.
- Produce documents typically required of workplace professionals that meet reader's informational needs and genre expectations (e.g., they are well organized, acknowledge realistic constraints, credible, current, comprehensive, and accurate).
- Integrate visuals, text, and basic principles of document design using appropriate digital technologies
- Revise and proofread documents for readability, accessibility, ethical presentation, style, tone, and usage.

Choose One of the Following Options

1. Website Design Project

In this scenario, you have been asked to create a website for a company that is exploring the option of managing their own website instead of contracting it out. You need to create a 4 page website using one of the free web design site platforms for a business of your choosing. The website will have at least 4 sections/ pages:

- Homepage
- About Us (mission statement, contact info, and information about your organization etc)
- Services/Products
- One page designed to be updated regularly, such as Sales or a Blog or Current Events

Then write a 2 page memo that explains the rationale behind the design decisions made to the boss of the company. The memo should contain a summary, introduction, explanation, and conclusion.

2. Website Recommendation Report

In this scenario, you are employees of a company of your choosing that desires to update their website. You need to write a 5-7 page report that analyzes the current website's usability and recommends changes that should be made. The report should include visuals and textual descriptions and recommendations. Your recommendations can include but are not limited to:

- Design and Layout Concerns
- Accessibility Issues
- Mobile Access Concerns

- Social Media and Marketing Opportunities

The recommendation should be focused and realistic. The final report should include an executive summary, introduction, usability analysis, recommendation, and conclusion.

3. Video Recommendation

In this scenario, you are working for a company that manages websites for clients and you have been tasked with recommending updates to a client. You need to produce a 10 minute video that highlights for the client your company's areas of concern and recommends how those areas could be updated by your company.

Your recommendations can include but are not limited to:

- Design and Layout Concerns
- Accessibility Issues
- Mobile Access Concerns
- Social Media and Marketing Opportunities

The written component of this option includes a detailed transcript of the video and a letter of transmittal that introduces the recommendation video to the client.

Skills: Research, Summary Writing, Critical Thinking and Analysis

Genre: Records and Documentation

Research Log

[Assignment courtesy of Cheryl Rauh]

Record your research progress for your own notes as well as for a supervisor who is keeping tabs on your progress. This should be an informal log with dated entries appearing in chronological order. Briefly summarize all research reviewed, reflect on its function in your project, and evaluate its credibility. You should include research you don't ultimately end up using in the report because it still shows work that was done.

Objectives

- Gather research from a variety of sources, including print, electronic, and primary sources.
- Summarize source materials accurately with ethical source documentation.
- Evaluate research credibility, considering currency, relevance, authority, accuracy, and purpose.
- Analyze research and extract relevant information for synthesis into a new purpose.
- Plan to develop content with accurate and ethical source documentation.

Description of Elements for Each Entry

- **Date:** Indicate when research was found to record progress and show continuous work over a time span.
- **Citation:** Record necessary source information so that the source material could be found by another person. Note, a link is not a citation; a citation should give enough information to provide credit even if the source ceases to be available.
- **Summary:** Accurately capture the major points and conclusions of a source for your own record and for another person to understand its meaning without having read it.
- **Evaluation:** Quickly demonstrate that you've considered the credibility of the source, and acknowledge its weaknesses. Factors to consider include currency, relevance, authority, accuracy, and purpose. Be wary of claiming a source has no weaknesses.
- **Discussion of Usefulness:** Record any thoughts you have on how the source will be useful for your project. Most especially, record any specific points, quotes, page numbers for relevant information that you might use in your report. In the workplace, this sort of notation might allow someone else to pick up where you left off.

Submission

For daily work and library day credit, you'll continuously submit this document with updates (at least 2 new entries per submission). The final submission should include a minimum of 8 entries. More entries are great and encouraged.

Sample Log Entries

Date	Citation	Summary	Function	Evaluation
10-Apr-14	"Bluebeam Case Study Berry Paperless Construction Project." <i>Bluebeam Case Study Berry - Paperless Construction Project</i> . Bluebeam, n.d. Web. 10 Apr. 2014. < https://www.bluebeam.com/us/solutions/case-studies/berry.asp >.	In this article, employees from both Perkins and will (the architectural firm) and berry (the contractor) discuss how they used Bluebeam Revu to accomplish most all of the submittals on the Overlook center project. This eliminated 42000 sheets of paper and streamlined the submittal process.	This article proves that it can and has been done by contractors and design professionals working together.	This article is biased toward Bluebeam Revu software but provides a valuable case study on how going paperless was accomplished.

April 22, 2014

Johnson, Lauren. "Top 10 Mobile Loyalty Programs from First Three Quarters." *Mobile Commerce Daily RSS*. Mcommerce Daily, 16 Oct. 2013. Web. 22 Apr. 2014.

In the Mobile Commerce Daily newsletter, they have an article that mentions the "Top 10 mobile loyalty programs from first three quarters." This article mentions specific companies and how they are retaining customer loyalty through mobile applications. As of 2013, some of the leading companies to develop these kinds of apps are Best Buy, Jamba Juice, Kroger, and Walgreens. The article gives a quick brief summary about each of the applications and how they relate to their store. For instance, Jamba Juice used an application through Spendo, where customers would enter the store and would receive a message if they had accumulated enough points to claim a reward. Simple things like this that generate customer loyalty.

The main weakness of this article is how there is no statistical reference to what makes these applications important. I understand that they are feasible and well developed, but there is no indication of facts about the applications and their coincided company.

My purpose for seeking the article was to find comparison to what bigger companies are doing with applications, and how they implement their apps. Also to see how customer loyalty interacts with mobile applications.

April 10, 2014

"BPM Case Studies." Interfacing Technology Corporation, *Unisys*. 07 12 2004. Web. 10 Apr 2014. <<http://www.interfacing.com/uploads/File/unisys.pdf>>.

Summary: Unisys, a worldwide IT services and solutions company sought to develop a unique system of process mapping which allowed them to improve efficiency, customer satisfaction, and share information with global branches through a link. The firm researched BPM solutions, selected an enterprise-wide software, Enterprise Process Center,(EPS), installed and implemented the system within one year.

Function: This case-study provides an example of a firm in the IT service industry who uses and specializes in desktops, servers, networks, telephone and wireless technology but still saw the need for a system that could track, map, and simplify business processes in an attempt to increase productivity. Included in this document are specific examples, steps to implementation, and results. “The simplicity that EPC brought to the task made our job much easier and enabled a quick, albeit partial, rollout of our methodology” - Unisys Director of Global Implementation

Evaluation: The company that produced the case-study, Interfacing Technology Corporation, appears to be credible. Established in 1983, claim software is “award-winning” but can’t find what award for the life of me. Also, ITC made the case-study so there is bias. Their software is used by many significant firms and organizations including the National Autonomous University of Mexico - Mexico’s largest educational institution. Detracting from the credibility is that it is a decade old.

April 15, 2014

Ziosk.com (This is the tablet that Chili’s plans to install and is the official website)

Summary: This is the official website of the company that Chili’s plans to use for their tablets. It gives specific statistics and plans for use including paying at the table, connecting with guests, and the menu and ordering functions of the tablet.

Plan of Use: This source will be important because it gives the exact functions of the planned tablets and also gives the estimated cost of the tablets. I plan to use it as base information for my feasibility analysis and to get facts and figures. It is not an article, but rather a list of facts and capabilities for the tablet.

Actual Use: I actually used this source to get specific facts such as the potential return on Investment, numbers of customer response surveys or numbers of people that enroll in loyalty programs. I also used two of the visuals in order to better prove my point.

Evaluation: This source is most likely biased since the company is trying to get companies to adopt its tablet. I’m going to have to be careful and make sure it is the best option for Buffalo Wild Wings or look at other options to see if one of those would be more efficient.

Conclusion: After doing further research on other potential tablets, I found that Ziosk seems to be the best fit for Buffalo Wild Wings.

Skills: Research, Summary Writing, Critical Thinking and Analysis

Genres: Email, Memo, Letter [routine correspondence]

CASE STUDY: THE SPACE SHUTTLE CHALLENGER

[Assignment courtesy of Devin Patten]

This unit will revolve around a case study of the 1986 Space Shuttle Challenger disaster. Your deliverables will be two emails and two internal memos (and your research). There is a bit of a discrepancy between the nature of “routine correspondence” (quicker and less formal) and the serious matter of the Challenger disaster, and with this in mind, we will address this case study in two ways: first, we will write a series of correspondence to plan a larger project addressing the Challenger disaster. Second, we will (in a later unit) work in groups to create an online database of your group’s response to the Challenger research.

To summarize, we will use this unit to *plan* a research-based group project on the communication and ethical failures surrounding the Challenger launch. You will submit correspondence to your group which will contain your recommendations on which Challenger-related issues to address in the Collaborative Writing Project. Your correspondence will show the research items you believe your group should use to formulate its position and to make recommendations or arguments.

On the determined due date, deliver the following items:

A memo detailing the ethical failures that occurred in the days preceding the Challenger launch.

Include at least one source in your memo, demonstrating what that source says, and where the information comes from.

An email demonstrating the timeline of ethical failures surrounding the failed launch, touching on specific, key events that cover a broad range of time. Again, include at least one source in your email, demonstrate what that source says, and where the information comes from.

A memo detailing the communication failures that took occurred in the days preceding the Challenger launch. Include at least one source in your email, demonstrating what that source says, and where the information comes from.

An email demonstrating the timeline of communication failures surrounding the failed launch, touching on specific, key events that cover a broad range of time. Again, include at least one source in your email, demonstrate what that source says, and where the information comes from.

Submit to Canvas at least five sources (if they are articles, submit the full article) that you will use when writing your longer report on the ethical and communication flaws surrounding the Challenger launch.

Skills: Research, Summary Writing, Critical Thinking and Analysis, Writing for Public Audiences

Genres: Writing for the Web - Blog Post

ETHICS CASE STUDY

[Assignment courtesy of Devin Patten]

This unit will revolve around a case study of your choosing. Your deliverables will be one blog post of 1000 words.

Your post should be written as a contribution to a corporate blog about business ethics. The blog is used as a forum to explore ethical dilemmas and failures, and each post explores a new case study. Your case study should be factual (historical) and business oriented. The curator of the blog offers flexibility in your style and approach, but asks for a few specific items:

Posts should be no more than 1100 words and no less than 900. (Bibliographic information, i.e., your Works Cited page, do not factor into the word count.)

Posts should be research oriented, and should include at least three sources from academic publications or respected national media outlets.

Posts should very briefly explore necessary contextual information (historical implications, organizational background, etc.) to establish context and enable understanding.

Posts should very clearly demonstrate:

- a. Wherein is the *dilemma*; who had the chance to alter this outcome, and why did they not? What competing forces led to this being a case study in ethics? (Note: this means a straight-forward criminal violation is not an appropriate case study.)
- b. What type of ethical breakdown occurred?
- c. What lessons can a business-minded audience take away from this case study?
- d. Finalize by articulating three specific, open-ended discussion questions a manager could use to discuss this case study in a meeting. Skills: Research, Critical Thinking and Analysis, Persuasive Writing, Document Design

Genre: Proposal, Memo, Brief Report

Proposal Assignment

Relevant Course Objectives: 1, 2, 3, 7

[Assignment courtesy of Dan Von Holten]

Written Proposal (500-800 words)

At their core, proposals are arguments meant to convince the primary audience to do something. This may be to grant you or your group permission, funding, or materials. Proposals may also be used to offer services or products to potential customers, sometimes in response to a potential customer issuing a call for proposals (or bids). Even if you don't find you have an immediate need to write a proposal in your career, the ability to create a well-supported written argument is a valuable skill.

Objective

Create a proposal for a research project. This should be a project that you can maintain a keen interest in for many weeks. Based on the strength of the proposal, your instructor will approve or reject your project. **If rejected, you will need to either revise or start over.**

There are a variety of topics you can propose, but the end product of the project (what you are proposing) will include a formal, written document (a report, a feasibility study, a second proposal, etc.) and an oral presentation. Whatever your chosen project, it should be related to your chosen workplace. Better yet, it should be related to a particular aspect of your field of study.

Scenario

For this project, we are assuming you are currently working for an organization. This could be one of the organizations you used in your job packet or brochure assignments, or a current employer.

Identify a topic that is relevant to the workplace you've chosen. This could be something about trends or new information in the field or something related to the work environment.

Some sample topics include: the feasibility of shifting the office to all open-source software, exploring new markets for business, or the costs and benefits of installing convertible standing/sitting desks in employee workspaces.

Product Format

Your proposal will be an informal proposal written in the form of a memo or informal report (reference your handbook). The written proposal should be **500-800 words in length** (not including appendixes, if used).

Use CMS endnote documentation. (pgs 152-61 in your handbook)

Use an appropriate font and keep one inch margins on all sides. (See pg 317-9 "Typography" in your handbook.)

Sections

Your proposal should include the following sections/headings

- Introduction (does not need a heading)

- Problem or Opportunity
 - Establish the need for your research project
- Background (optional)
- Research Objectives/Topics of Investigation
 - Explain what specific information you will gather for your research project
- Methods or Procedure
 - Explain how you will gather your information. Will you primarily rely on published work? Will you do any primary research of your own, such as a survey or observation?
- Work Schedule

Writing the Proposal

The proposal will do the following:

- Explain your final research project and the need for the research
 - What problem or opportunity are you exploring, and what will the final product be?
 - Why is this important?
- Identify what specific information your proposed project will collect
- Explain how you will complete the project (this includes explaining what kind of research you will do and why)
 - What kind of research will you do? What specific publications will you reference?
 - Why is this method the best approach for your research objectives?
- Prove that you have the resources, ability, and time to complete the project
 - Show that you can do it in the time we have.
- Give a schedule that shows how your project will be completed
 - This can be a task schedule, calendar, or Gantt Chart, but should detail the tasks involved in your project.

Assessment Criteria

The proposal will be assessed on the following criteria. You must meet all criteria in order to get a passing grade.

Purpose/Focus

- The proposal is clearly addressed to a specific person and focuses on the reader's needs.
- The proposal clearly and convincingly establishes the need for the research to the target audience (supervisor).
- Research Objectives are clear and specific.

Development

- The proposed research objectives will provide a thorough investigation of the proposed project
- The research methods establish an effective means of meeting the research objectives.
- The proposed work schedule is reasonable and specific.

Organization

- The proposal contains all requested sections (with headings).
- Information within sections is grouped or arranged in a way that aids the reader and the message.
- The writing makes effective use of organizational markers (headings, lists, etc.) to increase readability.

Tone

- The language of the proposal is clear, concise, and easy to follow.
- The language develops and maintains an image of the writer as a competent professional.
- Proposal is respectful of the reader without sounding stilted or overly passive or aggressive.

Style/Design

- The proposal follows formatting guidelines outlined in the assignment (including length and layout)

Editing/Proofreading

- There are few mechanical errors in the writing.

C-Level Proposals will make a genuine attempt at meeting the intended purpose of the assignment, but have weakness in areas such as focus, development, organization, and tone.

B-Level Proposals will meet expectations in most of the evaluation categories; particularly Purpose/Focus and Development. The content will be organized and show consideration for the reader's needs and perspective throughout the document.

A-Level Proposals will exceed expectations in several categories, one of which must be Purpose/Focus or Development. In addition to requirements for B-Level work, the writing will show the writer has anticipated the reader's needs and displays one or more of the following features: sophistication in thought, exemplary clarity and accuracy in language, fluidity of prose, control in aspects of design and organization, or presentation of a strong professional persona.

Skills: Research, Critical Thinking and Analysis, Writing for a Formal Audience

Genre: Formal Report

Formal Report

Relevant Course Objectives: 1, 2, 3, 4, 5

[Assignment courtesy of Dan Von Holten]

A large project will often culminate in a formal document (often some type of report or proposal) that shares your conclusions and/or recommendations while providing sufficient background information.

Objective

Create a formal report based on the research outlined in your proposal. Your report will need to include front and back matter in addition to the main text. Your writing should take into account the needs of your audiences which will at the least include your English 417 instructor and your classmates as an auxiliary audience. The document should be detailed yet concise and the information from your sources should be balanced with your own analysis of the information. This project touches on most of the learning objectives for the course.

Product

You will produce a formal report based on your proposed research project.

- The report should show application of design methods covered earlier in the course and make use of visual aspects such as graphs, charts, or images.
- The report should maintain an objective tone, even if it is making recommendations.
- Formal documents can vary in length depending on the topic and the information presented. It will, however, need to use an acceptable 12pt font for the body text.

Writing the Report

Detailed information on formatting the report will be available later; however, the report will be in formal style as detailed in the course readings below. It will include front and back matter and your sources will be documented using the *Chicago Manual of Style* notes and bibliography approach.

Remember the connection between document design and accessibility: what choices can you make as the writer to ensure your reader can easily find key points, examples, etc.?

Assessment

Because this document is the culmination of your research project, it is expected to be highly polished and professional. As in previous assignments, I will be looking for evidence of your writing process—planning, drafting, revising, and proofreading—as well as for clear organization and effective document design.

The report will be assessed on the following criteria. You must meet all of the criteria in order to get a passing grade.

C-Level Reports will overall communicate a message related to the purpose of the report, but may have issues in areas such as focus, development, organization, or tone. This level will get the job done, but may require some extra work on the reader's part to understand one or more key points.

B-Level Reports will meet most of the expectations listed in the assessment criteria, particularly in higher order categories like Purpose/Focus and Development. The content will show consideration for the readers' needs and respective perspectives throughout the document. In general, this level will be acceptable for a workplace environment and demonstrate competence on the part of the writer.

A-Level Reports will exceed expectations in several categories, particularly higher order categories. In addition to requirements for B-Level, the writing will show anticipation of the reader's needs and displays one or more of the following features: sophistication in thought, exemplary clarity and accuracy in language, fluidity of prose, and control in aspects of design and organization, or presentation of a strong professional persona.

Purpose/Focus

- Each part of the front and back matter effectively achieves its purpose within the document.
- The main text is accessible to primary and secondary audiences.
- Research is used to effectively support claims.
- Conclusions (and recommendations if used) are logical and clearly drawn from evidence and claims presented in the report.
- Visuals are placed appropriately in the text and clearly relate to the discussion in the text.

Development

- A minimum of two visuals are appropriately, effectively, and ethically used to support the document.
- Visuals are accompanied with a descriptive title and caption.
- Research, whether primary or secondary, is credible and relevant.
- Information from research is integrated into the text cleanly, only using quotation when necessary and relying primarily on paraphrase and summary to maintain the flow of the writing.

Organization

- Letter/Memo of transmittal is before the title page.
- Front and back matter is organized appropriately around main text.
- All parts/sections in the main text are logically organized. Headings are used consistently and relate to the content.
- Where appropriate, the report makes use of organizational markers to improve readability.

Tone

- The report maintains a professional and objective tone.

Style/Design

- The report includes all parts/sections as discussed in course materials and class sessions.

- Writing is in an appropriate font and size.
- Pages and text are formatted using block paragraphs and continuation headings.
- Research is documented using both endnotes and a bibliography.
- Sources are cited according to CMS guidelines.

Editing/Proofreading

- Document is free of errors.

Skills: Research, Critical Thinking and Analysis, Writing for a Public Audience, Document Design with Visuals

Genres: Email, Brochure or Newsletter

The Email and Brochure or Newsletter Project

[Assignment courtesy of Anna Goins, adapted from Robin Mosher]

We know from class discussions that projects in the workplace can span any number of timelines, from small projects with quick turn-around-deadlines to large projects with years-long goals. Therefore, you must be able to adapt your planning skills to each scenario by understanding rhetorical context and workplace constraints. Because this project has a clear and direct goal – to deepen our awareness of workplace writing – and a simple approach to gathering evidence – professional email –you will have just two weeks to complete your work.

Let's be flexible on the mechanics of this project: if you'd like to work in teams of 2 or 3, you may, and if you'd like to work individually, you may. If you choose to work with classmates, please know that you're implicitly agreeing to have your work graded collectively and that you will be required to complete a team charter.

What will you do?

The two steps to completing this assignment are the familiar essentials of writing in the workplace: gathering information and presenting your findings.

Gathering information

Identify 10-15 people you know who have worked fulltime in a professional field for at least two years. Draft, revise, and send a professional email to each of them asking the assignment's central questions:

- What kind of writing do you do for your job?
- How important is writing in your profession?
- What kind of judgments do you find yourself making about what you read from colleagues and/or clients?

Because we want to be able to draw general conclusions, your ultimate goal is to have information from at least seven respondents. Please print a copy of every email you send and receive, and plan to turn those copies in along with your brochure or newsletter.

Presenting your findings

Create a brochure or newsletter that summarizes your findings and offers insight into how the content relates to your target audience: college students who have not yet completed a professional internship or worked in a professional environment. Be sure to follow our class handbook's guidelines on effective organization and document design, to include any relevant visuals/graphics, and to be mindful of color choices.

How will the work be assessed?

Both the email and the final document, brochure or newsletter, will each be assessed upon its clarity in focus and purpose – as determined by the rhetorical context of each; development of ideas; logic of organization; integration of visuals; consistency in tone/style/editing/voice; and, overall document design and proofreading.

Skills: Reflection, Critical Thinking and Analysis, Persuasive Writing, Document Design

Genre: Portfolio Compilation

Professional Portfolio

Relevant Course Objectives: 1, 2, 3, 6, 7, 8, 9

[Assignment courtesy of Dan Von Holten, based on Theresa Merrick's Portfolio Assignment]

The Portfolio demonstrates the student's strengths, areas of progress, and areas for future development as an engineer. The Portfolio should be a compendium of professional activities that demonstrate both the best work of the student and the range of their skills. The Portfolio should also show how those skills have developed over time (for example by including material from past and current courses, extracurricular activities, etc.).

The final submission of the Portfolio must include an introduction that frames the Portfolio for prospective viewers. Much like the cover letter that accompanies a résumé, **the introduction helps the viewer to understand both the overall skills of the student and the significance of the various elements included in the Portfolio.**

Audiences

Prospective Employers or Collaborators

Students may choose to make their portfolio public or accessible to prospective employers or collaborators – indeed you are encouraged to do so. Such viewers are interested in assessing not only your engineering skills and abilities, but also the compatibility of your philosophy and approach to engineering with theirs. Moreover, they want to see a range of challenges overcome and a range of strategies both in engineering and research, to demonstrate your ability to draw from what exists and to develop new ideas.

Instructor

Your instructor wants to see evidence of your ability to practice engineering and express that practice in clear and meaningful ways with substantial evidence to support your claims.

Required Components

Introduction to the Portfolio (Professional Statement)

This document is similar to a cover letter but can be used more generally. The professional statement offers a key entry point into your portfolio that summarizes your identity as a professional, areas of focus and strength, and areas for future development. In addition, it should provide initial guidance for navigating the portfolio. The portfolio introduction should be no more than 500 words in length.

You can pull from the professional summary and statement of qualifications you wrote earlier in the semester as starting points, but the material will need to be re-purposed and modified to function as your introduction. You should also look at your Week 1 Discussion Board (personal goals).

Philosophy Statement

A philosophy statement is a common feature in a portfolio. Some prospective employers may request a philosophy statement of some kind as part of your application. While the philosophy statement is usually related to your chosen career path, its primary purpose is to give the reader a sense of how you approach work and what drives you to do well on the job. This can take the form of a list of values or principles or, if your work is more problem-oriented, a process for solving problems.

Résumé

One page—using the various strategies that we have discussed in class.

We've already placed a résumé on the portfolio site and you've since adapted it for your proposal too. Re-evaluate your résumé in its current form (and function) in the portfolio.

Artifacts (minimum 3) with annotations

The artifacts form the primary evidence in your portfolio as they provide tangible evidence of past engineering activities. Artifacts should include a wide variety of resources, possibly including drawings, sketches, solid models, photographs of prototypes, research documents, etc.

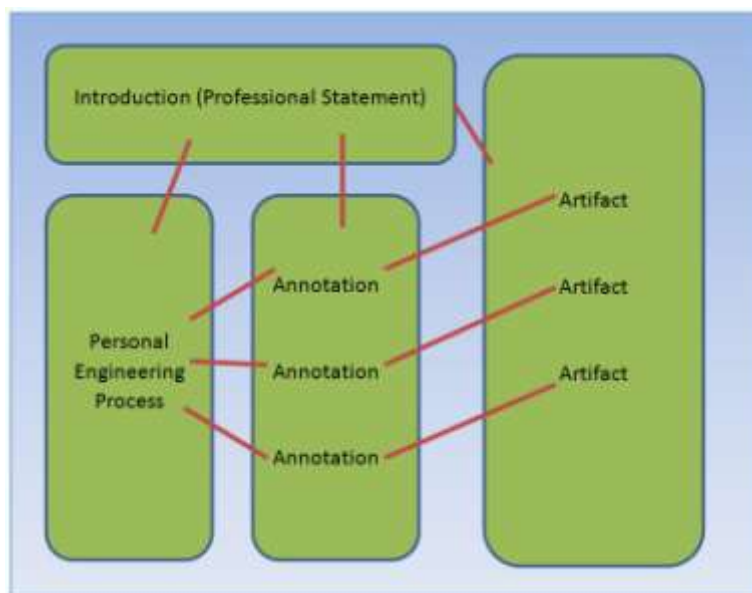
Have the annotation along with part or all of the artifact visible on the webpage rather than giving readers a link to a file download. The latter isn't likely to engage the viewer.

Format and Structure

You may structure and format your portfolio as you feel works best for your platform and intended audience; however, each component of the portfolio should be connected to the others. (See Fig 1 below).

Readers should be able to easily navigate your portfolio and its contents.

Figure 1: Portfolio Visualization



This diagram visualizes the portfolio content. Content in each section should connect with concepts in neighboring sections. Note the ways in which each component is connected to others and forms a comprehensive and cohesive portfolio.

Submitting the Portfolio

You will submit a link to your completed portfolio on Canvas

Assessment Criteria

The portfolio is a collection of documents (artifacts, annotations, etc.) that must all contribute to the same overall purpose to be effective.

C-Level portfolios will meet most of the criteria below (particularly Purpose/Focus and Development). Portfolios at this level will convey your message, but may not fully engage your reader or leave readers with some confusion.

B-Level portfolios will touch on all of the criteria listed below. Readers will easily gain a clear understanding of you as a professional.

A-Level portfolios will also meet all of the criteria listed below, but also show one or more of the following qualities: Richness and cohesiveness in thought, clarity and precision in language, fluid prose, or evidence of a strong professional persona.

Purpose/Focus

- The portfolio (introduction and philosophy in particular) presents the author as an emerging professional aware of his or her strengths and aware of areas for further development.

Development

- Claims are clear and specific (avoiding generalizations) and supported by evidence (including artifacts and annotations).
- The portfolio presents a breadth of evidence (artifacts, research, etc.) to support claims about the author.
- Portfolio conveys thoughtfulness in reflection (e.g. discussion of personal growth, quality, strengths, areas of progress, and areas of future development).

Organization

- Portfolio is easy to navigate.
- Portfolio makes use of organization strategies for clear communication discussed in English 417

Tone

- Language is clear and concise.
- Language conveys a formal, professional persona throughout portfolio.

Style/Design

- Portfolio makes use of design choices (such as color and font styles) that assist reader in navigation and reading.

Editing/Proofreading

- Writing is free of errors such as spelling and grammar.