

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 full 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.

![Bill's Computer Gaming Site Map](image)

**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
media 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 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 rational 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.

<table>
<thead>
<tr>
<th>Research Log</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Aging Workforce</strong>—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</td>
</tr>
</tbody>
</table>
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.

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**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.

<table>
<thead>
<tr>
<th>Warm</th>
<th>Cold</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Solicited</strong></td>
<td><strong>Unsolicited</strong></td>
</tr>
<tr>
<td>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.</td>
<td>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.</td>
</tr>
<tr>
<td>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.</td>
<td>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.</td>
</tr>
</tbody>
</table>

*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.](image-url)
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.

![Résumé example](image)

**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.

<table>
<thead>
<tr>
<th>Non-parallel List</th>
<th>Parallel List (Preferred)</th>
</tr>
</thead>
<tbody>
<tr>
<td>**Office Assistant, ABC, Inc.</td>
<td>Manhattan, KS**</td>
</tr>
<tr>
<td>• <strong>Edit and design</strong> the bi-monthly newsletter distributed to shareholders</td>
<td>• <strong>Edit and design</strong> the bi-monthly newsletter distributed to shareholders</td>
</tr>
<tr>
<td>• Responsible for <strong>assuring</strong> employees input time sheets on time</td>
<td>• <strong>Assured</strong> employees input time sheets on time</td>
</tr>
</tbody>
</table>
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.
Below you can see three lists of sample headings, each with a weakness. Revise each list to resolve the problem.

<table>
<thead>
<tr>
<th></th>
<th>Descriptive</th>
<th>Parallel</th>
<th>Length</th>
</tr>
</thead>
<tbody>
<tr>
<td>Samsung Infinity GS3 Wireless Speeds and Interface, LG Fomorian ZX2 Product Specifications and Use</td>
<td>✓</td>
<td>×</td>
<td>Too Long</td>
</tr>
<tr>
<td>Flavor 1, Flavor 2, Flavor 3</td>
<td>×</td>
<td>✓</td>
<td>Too Short</td>
</tr>
<tr>
<td>Mutual Fund Risks, Benefits of Mutual Funds</td>
<td>✓</td>
<td>×</td>
<td>Good</td>
</tr>
</tbody>
</table>
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 to 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 word 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,
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 successful complete the work. This is where a project schedules 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.
<table>
<thead>
<tr>
<th>Date Due</th>
<th>Task</th>
<th>Assigned to</th>
<th>Contribution Value</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>3/3/2014</td>
<td>Team Charter</td>
<td>Jerry</td>
<td>1</td>
<td>Completed</td>
</tr>
<tr>
<td>3/3/2014</td>
<td>Task schedule</td>
<td>Jerry</td>
<td>1</td>
<td>Completed</td>
</tr>
<tr>
<td>3/5/2014</td>
<td>Brochure basic design draft</td>
<td>Jerry</td>
<td>2</td>
<td>In progress</td>
</tr>
<tr>
<td>3/3/2014</td>
<td>MS Research</td>
<td>Joan</td>
<td>2</td>
<td>In progress</td>
</tr>
<tr>
<td>3/3/2014</td>
<td>MS Walk research</td>
<td>Skylar</td>
<td>2</td>
<td>In progress</td>
</tr>
<tr>
<td>3/3/2014</td>
<td>Contact Cassi D. for more information</td>
<td>Jerry</td>
<td>1</td>
<td>Completed</td>
</tr>
<tr>
<td>3/5/2014</td>
<td>Draft of memo</td>
<td>Everyone at 3/5 meeting</td>
<td>3</td>
<td></td>
</tr>
<tr>
<td>3/10/2014</td>
<td>Meeting Agenda</td>
<td>Jerry</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>3/10/2014</td>
<td>Meeting minutes</td>
<td>Jerry</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>Total contribution</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Jerry Smith - Project Manager**

- 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
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.

<table>
<thead>
<tr>
<th>Sample Agenda</th>
</tr>
</thead>
</table>
| 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.

The current draft of the brochure is posted on the google doc (link below)
https://drive.google.com/?hf845y43yfiahfkjasdkywiehfkbg//

Agenda for March 5th, 2013 Meeting
We will be meeting on First Floor of Hale Library at 11:30am
1. Review the Current Brochure Draft by Checking for Edits/spelling/grammar/visual distraction
2. Create Template and draft the Memo
3. Assign printers for the Peer Review Day
4. Assign who will print the Final Drafts

Have a Great Day and See you tomorrow!
From,
Jerry Smith
Project Manager

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.

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

3. **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.

4. **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 content 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?